

# 2025 ADVISOR'S GUIDE

PARTNERING WITH DONORS AND PROFESSIONAL ADVISORS TO IMPROVE THE HEALTH OF OUR COMMUNITY

Chester County Hospital is grateful for the generous support of people throughout our community. This guide offers donors, attorneys, tax professionals and financial advisors an introduction to charitable gift planning opportunities at The Chester County Hospital Foundation. We can assist donors in supporting our programs today, or creating a plan for tomorrow. Please contact us to learn more.

## **Collaborate**

Working together with donors and advisors, we can help integrate charitable giving plans into broader financial goals. All inquiries are welcome and confidential.

## **Give for Impact**

Our team can help plan a meaningful gift that makes a difference in the lives of patients. We get to know our donors' values and goals and match these interests with hospital initiatives that meet the greatest healthcare needs of our community.

## **Save Taxes**

Determining which assets to donate, and when, can result in substantial tax savings, allowing donors to give more, maximizing the impact of a gift.

## **Gift Options**

The Foundation accepts bequests, IRA qualified charitable distributions, securities, donor advised fund distributions, and beneficiary-designated gifts from retirement funds and other accounts. We can also help establish an endowment fund, charitable gift annuity or charitable remainder trust. Gifts can be made in memory of a loved one or in honor of a special person.

## **An Invitation**

Individuals who include a gift for The Chester County Hospital Foundation in their will or estate plan are included in the 1892 Society. Members are kept informed of hospital updates and are invited to special events with senior leaders. Sharing the details of a planned gift will help the Foundation receive it sooner and put it to use according to a donor's wishes. Those who prefer to remain anonymous may also be members of the 1892 Society.

*The Chester County Hospital Foundation does not offer tax or legal advice, and encourages donors to consult with their advisors regarding this information.*

All donations to The Chester County Hospital Foundation benefit programs and services at Chester County Hospital. A gift is used where the need is greatest at the time it is received, unless restricted to a specific purpose or endowment. Donors are encouraged to confirm their gift details in writing with the Foundation.

## Legal Name

The Chester County Hospital Foundation

## Federal Tax Identification Number/EIN

23-2267407

## Sample Bequest Language for a Will

*"I give, devise, and bequeath \_\_\_\_\_% of the residue of my estate (or \$ \_\_\_\_\_) to  
The Chester County Hospital Foundation, in West Chester, Pennsylvania, for general support of Chester County  
Hospital."*

Contact the Foundation for specific gift language to restrict a bequest to a particular use or endowment fund. This language will ensure a gift is used for its intended purpose.

## Beneficiary Designation Forms

Use the following address when completing a change of beneficiary form for an IRA, 401k, donor advised fund, Health Savings Account, life insurance policy or other account:

The Chester County Hospital Foundation  
701 E. Marshall Street  
West Chester, PA 19380

## Gifts of Securities

Foundation account information:

Broker: Charles Schwab

Account #: 9085-4375

DTC Number: 0164, Code 40

Contact us prior to transferring securities into the Foundation's account or for assistance in transferring mutual fund shares.

## Qualified Charitable Distribution (QCD) from an Individual Retirement Account (IRA)

Make checks payable to "Chester County Hospital Foundation" and include the account holder's name and "IRA charitable distribution" in the check memo.

Donors should inform their tax preparer that a QCD was made and provide a copy of our acknowledgment letter. For more information, visit our website and download our guide to QCDs.

*The Chester County Hospital Foundation does not offer tax or legal advice, and encourages donors to consult with their advisors regarding this information.*