

Heritage Circle of Friends

For more information about joining the Heritage Circle of Friends, simply call the Lee Memorial Health System Foundation Office at (239) 985-3550 or provide the following information and return to:

Lee Memorial Health System Foundation
Post Office Box 2218
Fort Myers, FL 33902

Name _____

Address _____

City _____ State ____ Zip _____

Phone _____

Email _____

I have already named Lee Memorial Health System Foundation in my will or other estate plan. Please enroll me as a member of the Heritage Circle of Friends and send more information.

I am interested in becoming a member of the Heritage Circle of Friends. Please contact me with information about:

Naming Lee Memorial Health System Foundation in my will

Charitable trusts

Charitable gift annuities

Creating an endowment fund

Life insurance giving options

Upcoming financial & estate planning seminars

**LEE MEMORIAL
HEALTH SYSTEM**

FOUNDATION

Funding Tomorrow's Healthcare Today

Lee Memorial Health System has been meeting the health care needs of Southwest Florida residents since 1916. Currently licensed for 1,070 beds, the system is community owned and operates under the direction of a 10-member publicly elected board. Major entities include:

Lee Memorial Hospital

Cape Coral Hospital

HealthPark Medical Center

**The Children's Hospital of
Southwest Florida**

HealthPark Care Center

Lee Memorial Home Health

Lee Physician Group

Lee Convenient Care

The Rehabilitation Hospital

**Wellness Centers of Fort Myers
& Cape Coral**

**LEE MEMORIAL
HEALTH SYSTEM**

Lee Memorial Health System Foundation, Inc. is the primary fund raising entity for Lee Memorial Health System and its related sub-agencies and entities. We are a tax-exempt 501(c)(3) corporation. Our Federal Tax Identification Number is 65-0645343. Donations made to support Lee Memorial Health System are tax-deductible to the extent allowed by law.

Planned Giving

Lee Memorial Health System Foundation

Post Office Box 2218

Fort Myers, FL 33902

(239) 985-3550

www.LeeMemorial.org/Foundation

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Donations of land and lumber helped build the original Lee Memorial Hospital back in 1916. Now, more than 90 years later, individuals continue to generously step forward to shape the future of Lee Memorial Health System through membership in the Heritage Circle of Friends.

Heritage Circle of Friends recognizes the generosity of those who have named Lee Memorial Health System Foundation as a beneficiary of their estate plans. Whether through a bequest made through a will, provisions in a trust or establishment of an endowment fund, these individuals have chosen to play a major role in shaping the future of health care here in Southwest Florida.

Along with being Southwest Florida's largest community-owned health care system, Lee Memorial is also the largest public health care system in Florida that receives no direct taxpayer support. Donations from individuals help us meet the ever-growing demand for high-quality hospital services. Lee Memorial Health System Foundation is pleased to invite you to support our charitable lifesaving mission by becoming a member of the HERITAGE CIRCLE OF FRIENDS.



How do I become a member of the Heritage Circle of Friends?

Membership is offered to those who support Lee Memorial Health System Foundation through one or more of the following:

- Naming Lee Memorial Health System Foundation in your will or in a codicil to your existing will
- Creating a charitable trust providing current or future income to Lee Memorial Health System Foundation
- Making a gift through a charitable gift annuity
- Naming Lee Memorial Health System Foundation as beneficiary and assigning ownership of a life insurance policy to the Foundation
- Creating an endowment fund through an outright gift of cash, securities or other assets

Tax advantages/deductions associated with these gifts will vary on a case-by-case basis. We strongly advise seeking counsel from your attorney, accountant, financial planner or other estate planning professional prior to making any planned gift.

How are Heritage Circle of Friends members recognized?

We deeply value the support provided by members of our Heritage Circle of Friends. While a gift of this nature may not be realized for several years, immediate recognition of your generosity will be provided through:

- Permanent recognition on Lee Memorial Health System Foundation Donor Walls at Lee Memorial Hospital, Cape Coral Hospital and HealthPark Medical Center
- Recognition in Lee Memorial Health System Foundation's Annual Report

- Subscription to our quarterly newsletter – Foundation News
- Invitations to exclusive semi-annual luncheons with Lee Memorial Health System senior leadership
- Invitation to the annual Evening of Appreciation
- Gifts of \$50,000 and above may qualify for a naming opportunity depending upon current system needs and naming initiatives

We fully respect the confidentiality and wishes of Heritage Circle of Friends members. If you wish to make your gift anonymously, that desire will be honored.