

LEGACY GIVING:

YOUR WAY TO MAKE A LASTING IMPACT





Dear Friends,

Thank you for your dedication and consistent support to Community Memorial Foundation. From its humble beginnings to the world class institution it is today, Froedtert & the Medical College of Wisconsin Community Memorial Hospital only exists because of you and others like you.

Your steadfast commitment to our cherished hospital and foundation shows how much you value health care. To assist you in discovering ways you can preserve quality care close to home through a lasting legacy gift, we have created this guide. It provides information about the simple steps you can take to make a lasting impact through a gift of a lifetime.

Your legacy can sustain transformative care at our community hospital for generations to come. Should you want more information, please let us know.

We deeply appreciate your partnership.

Warmly,



Teri Lux, RN, MSN, NEA-BC
President
Community Memorial Hospital



Jessica Mulligan, MBA
Executive Director
Community Memorial Foundation

Community Memorial Hospital Mission

Community Memorial Hospital advances the health of the communities we serve through exceptional care enhanced by innovation and discovery.

Community Memorial Foundation Mission

Community Memorial Foundation promotes and enhances the health of all individuals in our community through the development and management of resources in collaboration with the mission of Community Memorial Hospital.

More Information:

To begin a conversation about leaving a legacy, contact Michelle St. Clair, at 262-257-3769 or email

michelle.st.clair@froedtert.com.

ANYONE CAN MAKE AN IMPACT WITH A LEGACY GIFT

WHAT IS A LEGACY GIFT?

You can leave a lasting legacy with the people and organizations that mean the most to you by including them in your estate plans. It's an easy way to make a lasting impact. See page 4 to learn the simple steps you can take to support the causes you care about with a legacy gift.

Did you know a legacy gift can benefit you, your family and your favorite charity? Many gift options can significantly reduce the taxes your heirs would otherwise owe to the government. There is a charitable gift for every financial objective. Learn more on page 5.

WHO MAKES A LEGACY GIFT?

Because you can make a legacy gift today without impacting your cash flow, lifestyle, or family security now, anyone can make a legacy gift. You can designate a specific dollar amount or set aside a percentage of whatever asset you wish. Even one percent can make a difference. Profiles of those who have included Community Memorial Foundation in their estate plans can be found on pages 6 and 7.

IMPACT OF LEGACY GIFTS

52 Evergreen Society commitments made since 2000

\$2.75 million total amount received



A CARING LEGACY

Jackie Irwin made her career at Community Memorial Hospital during her lifetime and left a legacy gift to preserve quality care close to home for future generations. Jackie was a Night Supervisor of patient care when the hospital opened in 1964 until she retired in 1992. When she passed away, she included Community Memorial Foundation in her estate plans.

Her legacy gift funded the new Emergency Department Nursing Station and scholarships for future healthcare workers. Already nine people have received Jackie Irwin scholarships. As of August 2018, \$12,000 remains to support the education



of future generations of nurses. Today, a cat statue in the hospital's healing garden commemorates her legacy of caring. Each night she worked, Jackie left bowls of milk for the families of cats she watched over. We deeply appreciate Jackie's legacy of caring, which continues to support exceptional patient care at the hospital and the next generation of nurses.

STEPS TO SUPPORT COMMUNITY MEMORIAL FOUNDATION WITH A LEGACY GIFT

You can help ensure our community hospital in Menomonee Falls remains a vital resource for future generations.

- 1 DETERMINE YOUR PASSION AND PURPOSE**
Decide where you want to make a lasting difference. You can designate your gift to the area of greatest need, scholarships, or designate a specific area such as the Cancer Care Center or the Heart and Vascular Center.
- 2 ASSESS GIFT OPTIONS, TAX IMPLICATIONS AND YOUR PRIORITIES**
There are many different ways to make a gift of a lifetime. Some are simple. For example, beneficiary designations can be made relatively quickly and easily.

Consider your personal situation and values. You can name Community Memorial Foundation in your will, trust, or as a beneficiary of an asset or insurance policy. Your gift can be a percentage of your estate, a specific asset or real property, or a named amount. A professional advisor can help you decide which instrument best meets your values and goals.
- 3 COMPLETE A COMMITMENT FORM**
In order to ensure your gift of a lifetime is spent the way you wish, please complete an Evergreen Society commitment form.
- 4 UPDATE YOUR DOCUMENTS**
Be sure to let your friends and family know about your decision, then contact your attorney, financial advisor or other professionals to ensure documents reflect your intentions. As your life changes, remember to update your estate plans too.
- 5 BECOME AN EVERGREEN SOCIETY MEMBER**
The Evergreen Society recognizes those who have made a commitment to the future of Community Memorial Hospital. There is no minimum to join the Evergreen Society and all gifts are truly appreciated. You can choose to be named or remain anonymous.



*The evergreen tree symbolizes how
legacy gifts nurture the continued growth
of Community Memorial Hospital.*

LEGACY GIFTS ANYONE CAN CREATE

Gift From a Will / Trust

Provide a gift to Community Memorial Foundation in your will or trust.

Gifts from Retirement Plans

You can designate Community Memorial Foundation as a retirement account beneficiary.

Gift of Life Insurance

You can designate Community Memorial Foundation as your life insurance beneficiary.

Gift by Beneficiary Designation

You can designate Community Memorial Foundation as a beneficiary of your bank or brokerage account.

Gift of Non-Cash Assets

Use stock, mutual funds, real estate, or business interests to fund your gift.

Gift Your Home

You can name Community Memorial Foundation as a beneficiary on your real estate deed.

A LEGACY OF HOPE



In the early 1960s, Llewellyn and Alice Tietz worked tirelessly to build a community hospital to provide quality care close to home. In 1964 the hospital opened its doors in Menomonee Falls. Froedtert & the Medical College of Wisconsin Community Memorial Hospital is the realization of the dream of Menomonee Falls Village leaders and residents long ago.

Throughout his lifetime, Llew was actively involved in hospital and foundation board and committees.

Both he and Alice supported the hospital and foundation, championing capital campaigns, special events and other fundraising activities to nurture the hospital's growth. In 2000, they became charter members of the Evergreen Society by naming Community Memorial Foundation in their estate plans. A rock near the hospital's entrance commemorates the Tietz's lifetime of contributions to their community hospital.

Today the Tietz's gift of a lifetime ensures their community hospital will remain a strong, vital resource for future generations.

EVERGREEN SOCIETY MEMBER PROFILES

LEADING THE WAY:

SHARON AND GERALD (JERRY) ELLIS



Jerry and Sharon Ellis

Sharon Ellis has served as chair of the board of directors of Community Memorial Foundation since 2015, and has been a board member since 1990. She is a long-time Menomonee Falls champion and president of SQE Communications Group, LLC, a business and interpersonal communication consulting firm. She and her husband, Jerry, live in Menomonee Falls, where they have raised one son.

Sharon still remembers receiving the call from Dick Becker inviting her to join the foundation board nearly three decades ago. She was actively involved in the Chamber of Commerce and community efforts, and honored and thrilled to become part of an amazing asset in the Menomonee Falls community.

Like others in the community, Sharon, her husband, son and elderly family members are grateful to receive exceptional care at Community Memorial Hospital. Sharon shares, "It is easy for us to recognize how blessed we are to have such exceptional care within two miles of our home."

Sharon and her husband chose to join the Evergreen Society because, "It seemed like the logical and right thing to do. We already support the hospital and want to continue that with a final contribution when the time comes. It really is so easy. We talked with our advisor, signed some paperwork, and we were done!"



"We already support the hospital and want to continue that with a final contribution when the time comes. It really is so easy."

Jerry and Sharon have named Community Memorial Foundation as a beneficiary of an investment at a set percentage. Rather than designate it for a specific area, they are directing their gift of a lifetime to benefit the long-term financial stability of the foundation. You can name the foundation as the sole or partial beneficiary of an asset at whatever percentage makes sense for you. You can also support the foundation's endowment through a legacy gift.

FAMILY FIRST: THE WAALAS' LEGACY

Twenty-nine years ago, Shelly Waala began as a nurse intern on the Medical Surgical floor of Community Memorial Hospital. Today, she is the Vice President of Patient Care Services and Chief Nursing Officer for the Community Hospital Division and the hospital is part of Froedtert & the Medical College of Wisconsin. Over that time, Shelly and her husband David have raised six children in West Bend, Wisconsin.

Shelly has also been a patient and family member at the hospital. She gave birth to all of her biological children at the hospital, and in 2018, she had a heart ablation in the hospital's Cardiology Department. In 2011, David's father had heart surgery and spent his time recuperating in the Intensive Care Unit, Modified Care Unit and Inpatient Rehab. In every instance, the experiences of the Waalas and their family at the hospital were exceptional. In addition, their two oldest, Harrison and Madeline, volunteered at the hospital as Volunteens; and Harrison earned a Community Memorial Hospital Medical Staff Scholarship.



Shelly and David Waala with Madeline, 21; Hayden, 19; Eli, 16; Keaton, 16; and Mia, 13. Harrison, 24, is not pictured.

Because of positive, impactful experiences, the Waalas decided to include Community Memorial Foundation in their estate plans in 2013. "Community Memorial Hospital has been part of the fabric of our family. Joining the Evergreen Society is our way of giving back to the hospital and foundation." Shelly urges anyone considering a planned gift to learn more by calling the foundation at 262-257-3769.



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The Waala family has chosen to leave their legacy gift through a bequest in their will. Like David and Shelly Waala, you can name Community Memorial Foundation in your will. You can designate a specific dollar amount, item or asset, percentage or remainder. You can also direct your gift of a lifetime to benefit a specific area or the area of greatest need. Please contact the foundation for specific information should you want to make a legacy gift from your will.



*The true meaning of life is to plant trees
under whose shade you do not expect to sit.*

~ Nelson Henderson



**Community Memorial
Hospital**

**Community
Memorial**
FOUNDATION

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