



Legacy



GIVE WELL GIVE WELL

How Your Choices Now Can Impact the Future

Paul Mickiewicz and his family have been patients of Aurora Health Care throughout their lives—including his mother, Eleanore, who received care from Aurora at Home in Manitowoc County.

Paul graduated from Washington High School in Two Rivers. He served in the U.S. Coast Guard and U.S. Merchant Marines. Following his service, Paul was employed with and retired from the U.S. Postal Service.

In 2013, Paul contacted Aurora Health Care Foundation to see how he could include Manitowoc County's Aurora at Home in his living trust. Aurora at Home has been providing comprehensive, compassionate home care throughout Eastern Wisconsin for more than 100 years.

He spoke of his mother who received care from Aurora at Home for the last five years of her life. He wanted to make sure elderly in Manitowoc County get the help they need. He

wanted his “money to go where it’s going to do some good.”

Paul met with Aurora Health Care Foundation staff several times to make sure his intentions were known. During these meetings, he expressed his confidence in Aurora. True to his word, Paul provided a generous gift to our home health services in his living trust, which his attorney, Michelle Birschbach, helped him create. Ms. Birschbach has noted that making a charitable gift through a living trust is an easy way to support a beloved charity.

Paul passed away in 2018 and, as planned in 2013, Aurora at Home in Manitowoc County was listed as a beneficiary in his estate. Because of this generosity, Paul’s legacy will continue to live on through a fund in his name that will be used to help people in Manitowoc County, regardless of income, to stay in their home, after surgery or in the face of chronic illness.



Like Paul, you can ensure your support for Aurora Health Care programs that are important to you continues after your lifetime. To learn more about planned gifts, contact John Holmberg at 630.929.6945 or john.holmberg@advocatehealth.com.

3 Stages of Will Planning

A will isn't just a list of who gets your stuff—it's a reflection of your life. It reveals who and what mattered most to you.

Just as people are in different stages of life, they're also in different stages of will planning. Which stage are you in? See which stage fits you, and what you need to know.



I don't have a will. Do I really need one?

Definitely. A will is the most important estate planning document an adult can have, no matter your age or income. If you have children or own property or possessions, you need a will. Don't let the state in which you reside decide what happens when you're gone. Having a will saves your loved ones time, money and heartache.



I'm ready to create my will.

Great! You've taken the first step to creating a secure future. Work with an estate planning attorney to compile a list of your assets and who you want to receive them. Select an executor to implement your will after your passing, as well as name guardians for any children or dependents under your care.



I have a will but want to update it.

Good idea. You can consult with your estate planning attorney about changing your will whenever you want. Some situations that could prompt an update:

- New marriage
- Birth of a child
- Passing of a loved one
- Self-sufficiency of grown children
- Changes in tax law
- A desire to make a gift to Aurora Health Care Foundation

Your Will Can Further Our Mission

We would love to talk with you about how a gift in your will can make a meaningful difference to our patients and communities.



The Amicus Society

All planned giving donors qualify for membership in the Amicus Society, created to recognize their foresight and kindness. Each year, the Foundation holds a special luncheon for Amicus Society members to honor them, provide updates on the impact of their gifts and share information on the latest developments at Aurora Health Care.



Retirement Plan Assets: Your Key to Making a Bigger Impact



“What is a legacy? It’s planting seeds in a garden you never get to see.” That line from the acclaimed musical *Hamilton* is poignant—but it isn’t entirely accurate.

As you consider your own legacy, you can see the garden. You see the great things the people and causes you care about are doing now—and the great things they could do in the future.

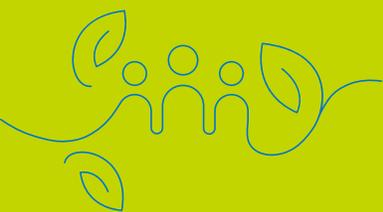
Our goal is your goal: Make the biggest difference possible and help the most people possible. That means getting the most value out of your assets, including your hard-earned retirement savings and investments.

As much as *37 percent* of your retirement plan assets can be consumed by income taxes after your lifetime—distributions from inherited retirement plan accounts are taxable as ordinary income to the person who receives

them. But when you give all or a percentage of your retirement plan assets to Aurora Health Care Foundation, we receive 100 percent of the funds. The IRS takes nothing.

Here’s how to get your legacy garden growing:

- 1.** Contact the administrator of your retirement plan and request a change-of-beneficiary form or simply download a form from your provider’s website. (You may modify beneficiary designations at any time to meet your changing needs.)
- 2.** Decide what percentage of the account you wish to give to Aurora Health Care Foundation and name us, along with the stated percentage, on the beneficiary form. Return the form to your plan administrator.
- 3.** Tell us about your gift! It would be our honor to thank you for your support. Plus, your generosity can inspire others to follow your example.



No Green Thumb?

We’ll help you plant the seeds for a legacy that will make a lasting impact on Aurora Health Care. Contact John Holmberg at 630.929.6945 or john.holmberg@advocatehealth.com to get started.

Protect Those Who Matter Most to You

Think for a moment about everything you care deeply about: your family, your friends and organizations such as Aurora Health Care. Now think about everything you own: bank accounts, real estate, stocks, retirement plans, life insurance, antiques and jewelry.

When you're gone, will the things you own go to the people and causes you love?

If you don't have an estate plan, state law will decide how your property is distributed, and those you care about would wind up with only some—or none—of your assets.

An estate plan is like a guide for your family—a map of your passions that helps your loved ones know what to do in the weeks and months after you're gone.

Your Next Steps

You don't have to do it alone. (In fact, you

shouldn't.) An estate planning attorney will help ensure that your documents are in order and your family is cared for. You need someone who understands the laws in your state as well as federal law and someone who can help translate your wishes.

To Prepare for the Meeting:

1. Make a list of your major assets. This should include real estate, stocks, retirement plans, life insurance, bank accounts, certificates of deposit, art, antiques and jewelry.
2. Consider everyone you wish to benefit. If you are thinking about including a gift to Aurora Health Care Foundation, we would be happy to help you. We can provide official legal wording for your will or discuss how your gift will further our mission to serve the health needs of our community. We would also love the opportunity to thank you for your gift.



What About Your Loved Ones?

Your loved ones need a plan for the future too—and you should know what it is. If you don't, it's time to talk. Our FREE guide *One of the Most Important Talks You'll Ever Have* can help you navigate the conversation. Use the enclosed reply card to request your copy.



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If you do not wish to receive any future fundraising communications from Aurora Health Care Foundation, please visit aurora.org/foundationoptout or call 877.460.8730.

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