



Legacy

An Amicus Society Publication



GIVE WELL GIVE WELL

Continuing Her Life's Work

For nearly two decades, Mona Hietpas was a leader with Family Service of Milwaukee, now known as Aurora Family Service, which helps promote family wellness and self-sufficiency through every stage of life.

With partners David Hoffman and Jean Robinson, Mona helped found the program's Family Therapy Training Institute, or FTTI, in 1972. Mona describes this postgraduate professional school for marriage and family therapists as the beginning of the family therapy movement in Milwaukee.

"This training body was created to help our therapists better understand the full environment of what their patients experienced," Mona says. "Many individuals suffer from anxiety or depression. The effort in FTTI is to help therapists use a systemic approach to help clients understand the causes of their anxiety. Family therapists help people to better relate to family members and other small groups."

Partnered with Milwaukee Mental Health Consultants, the program today provides mental health professionals advanced skills for certification. Around 10 therapists complete the program each year. It's a passion that Mona will continue to support with a gift written into her estate plan for Aurora Health Care Foundation, leaving a positive influence on mental health for years to come.



"I want to make a contribution to what has truly been my life's work," Mona says. "In our world right now, we end up being more tribal than compassionate. There is such a need for trained family therapists. I hope we can return to an understanding of our culture and how we relate to each other with more compassion."



To learn how you can ensure your support for the programs you're passionate about continues into the future, contact John Holmberg at 630-929-6945 or john.holmberg@advocatehealth.com.

Achieve Your Charitable Goals



Secure your short and long-term financial goals with thoughtful estate planning. A smart plan will protect the financial needs of loved ones while still achieving your philanthropic mission.

Review these goals to turn financial aspiration into charitable action.

Goal: Receive Additional Income

Supplement your retirement income and feel secure about your family's future with a life income gift. You make a gift to Aurora Health Care Foundation today using cash, marketable securities or other assets, and you receive payments for life.

Goal: Eliminate Capital Gains Tax on Stocks

When you donate stocks you've owned for more than one year that are now worth more than you originally paid for them, you can benefit yourself and Aurora Health Care. You can reduce or even eliminate federal

capital gains taxes on the stock transfer and you may be entitled to a federal income tax charitable deduction.

Tip: There are a number of ways to give appreciated securities, such as outright giving or funding a charitable gift annuity or a charitable remainder trust. Contact John Holmberg to learn more.

Goal: Conserve Today's Finances

Save critical funds now by designating a gift to the Foundation in your will or estate plan. This is a simple, flexible way to be charitable that doesn't affect your budget today.

 Contact John Holmberg at 630-929-6945 or john.holmberg@advocatehealth.com to discuss which options can best meet your charitable and financial goals. Together with your professional advisors, we can design the best plan for you.



Planning Protects Others

You recognize the value of planning ahead, but it's important to take time to ready yourself for the difficult moments, too. We would like to share one of our top resources, ***What to Do in the First 48 Hours When You Lose a Loved One***, so you and your family are prepared for this challenging period. Return the enclosed reply card for your complimentary resource.

Pass Down a Legacy of Giving

The greatest gift we can pass down to the next generation is to instill the value of giving back. Showing loved ones that we are part of a larger community—and that what we put into it is what we get out—ensures that the next generation understands the importance of philanthropy.

By talking with family members now about your charitable goals, and engaging in acts of service, you become a role model and inspire others to follow your lead.

Start the Conversation

Set aside time or use everyday moments to talk about what it means to be charitable.

- Share your vision and goals for Aurora Health Care and other organizations you are passionate about.
- Ask family members which causes are important to them and how they show support.
- Request that your family consider their role in your own charitable giving plans.

Take the Next Step

Discuss taking your commitment to the next level.

- Consider volunteer opportunities with organizations, like Aurora Health Care that your family would like to support.
- Start charitable family traditions.

Solidify Your Plans

Discuss ways to fulfill your philanthropic aspirations.

- Contact John Holmberg to inquire about volunteering or other ways you can help.
- Leverage your estate plan to carry out your charitable wishes beyond your lifetime.

For more ideas about how to engage younger generations in the act of philanthropy, contact John Holmberg at 630-929-6945 or john.holmberg@advocatehealth.com.



Nurture the Giving Spirit

Do Good, Together

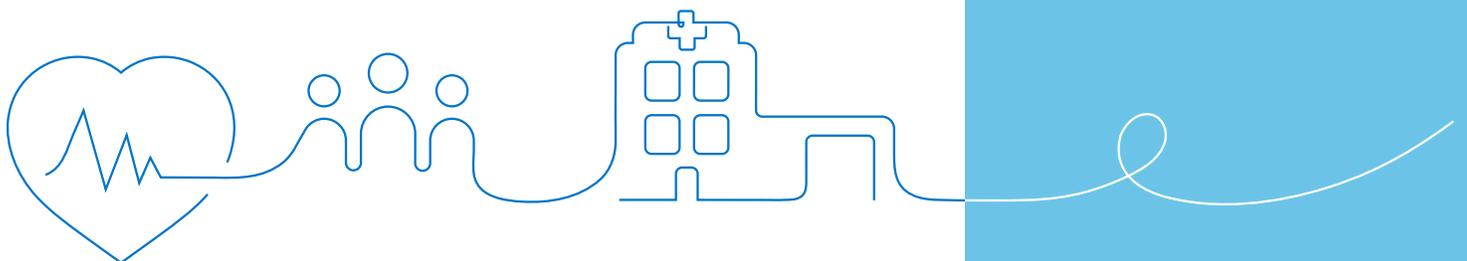
Volunteering as a family cultivates closeness while helping others; it also develops empathy, gratitude and responsibility.

Get Them Involved

Children can help walk dogs or put clothing into bags to donate; simple acts build the foundation of giving.

Donate Goods or Money

Let children see you in the act of giving away clothing or writing a check; doing is the best motivator.



Make the Most of Your IRA

For years, you've faithfully saved for retirement. However, what once worked in your favor—putting money into your IRA and enjoying tax savings—will change when you begin withdrawing funds. That's because you pay income taxes on the amount you withdraw from your IRA.

3 Solutions Based Upon Your Age

- 1. No matter your age,** you can designate Aurora Health Care Foundation as the beneficiary of all or a percentage of your IRA. Follow these simple steps to complete your gift:
 - Contact your IRA administrator for a change-of-beneficiary form, or simply download a form from your provider's website.
 - Name the Foundation and the gift percentage. Return the form to your administrator.
 - Let us know! We want to ensure that your charitable intent is carried out.
- 2. If you're at least 59½ or older,** you can take a distribution and then make a gift from your IRA without penalty. If you itemize your deductions, you can take a charitable deduction for the amount of your gift.
- 3. If you're 70½ or older,** you can give any amount up to \$100,000 from your IRA directly to the Foundation or another qualified charitable organization without having to pay income taxes on the gift.

The Amicus Society

The word “amicus” derives from the Latin word for friend. And so, it is fitting that Aurora Health Care's premier giving honor society is named The Amicus Society because it includes our special friends who have made a gift to Aurora Health Care Foundation in their future plans, just like all the examples you read in this newsletter.

In addition to making a lasting impact at Aurora Health Care, The Amicus Society members also receive:

- An invitation to our annual luncheon
- Access to exclusive events, tours and programs
- A special membership pin



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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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