



MASSACHUSETTS
GENERAL HOSPITAL



B E Q U E S T S

Creating a Legacy for
Future Generations



Massachusetts General Hospital has been at the forefront of medicine since receiving its charter in 1811. Throughout its almost 200-year history, bequests have provided vital support of the hospital's life saving mission.

- **1800s:** A bequest from William Phillips, the first president of the MGH Corporation, was one of the first estate gifts that the hospital received. His gift supported the construction of the Bulfinch Building, the hospital's first clinical facility, now a national landmark and the symbolic heart of MGH.
- **1940s:** Boston philanthropists George Robert White and his sister, Harriet Bradbury, left bequests that made possible the construction of the White Building, the gateway to MGH.
- **2000:** An anonymous couple understood the importance of flexible funding to the hospital and gave for 20 consecutive years to the MGH Fund. They continued that support by making a \$2 million unrestricted bequest to MGH.
- **Today:** Mrs. Christine Cook (cover photo) has named the hospital in her will. Her bequest will support cancer research and recognizes the compassionate care that Matthew Smith, MD, director of Genitourinary Medical Oncology, and other Cancer Center physicians and nurses gave to her husband.

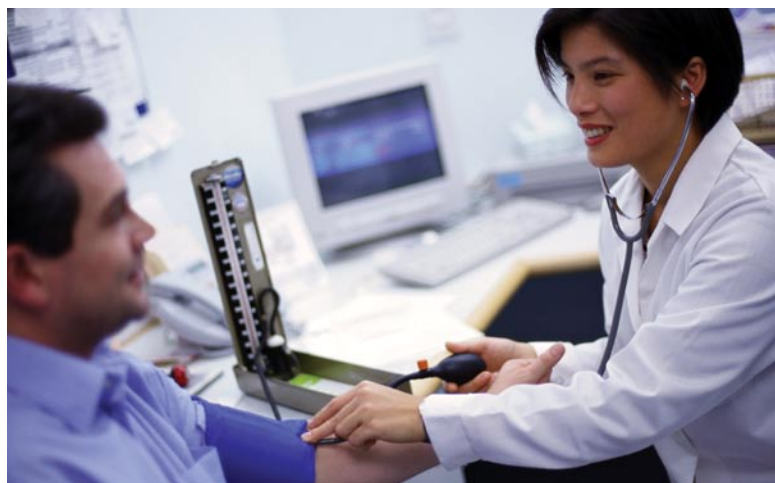
These are a few examples of the hundreds of visionary donors who have remembered the hospital in their estate plans. The future holds great promises in medical advances, and with the help of donors, MGH will remain at the forefront, enhancing patient care and fueling scientific discovery.

Including MGH In Your Will

You too can impact the lives of future generations of patients.

There are a number of ways that you can include MGH in your will:

- Give a specific dollar amount or a percentage of your estate to the hospital
- Bequeath stocks, bonds, real estate or other property to MGH
- Name the hospital a residual beneficiary, so that MGH receives the bequest after all other bequests have been satisfied and final taxes paid



BEQUEST LANGUAGE

While MGH is happy to provide the suggested language below, the hospital encourages you to consult with your attorney and family when making a bequest to MGH. If you are considering directing your bequest to a specific purpose, such as to support a particular department or division, please contact or have your attorney contact the MGH Office of Planned Giving.

Working together, we can craft language that will reflect your wishes and make a lasting difference at MGH.

Unrestricted Bequest

Medicine is a dynamic field, and MGH is constantly evolving to meet new challenges. Many supporters choose to make unrestricted bequests that enable the hospital to meet emerging needs. In 1945, most people considered transplant surgery in the realm of science fiction; in 1975, magnetic resonance imaging (MRI) did not exist. Unrestricted bequests can be used to buy essential new medical equipment, train caregivers or support research in emerging areas of medicine.

• SPECIFIC BEQUEST LANGUAGE

I give, devise, and bequeath the sum of \$____ [or percentage of the estate, description of the asset, etc.] to Massachusetts General Hospital, a Massachusetts not-for-profit, 501(c)(3) tax-exempt corporation having a principal place of business on Fruit Street in Boston, Massachusetts, to be used for its general purposes.



• RESIDUAL BEQUEST LANGUAGE

All the rest, residue, and remainder of my estate, both real and personal, I give to Massachusetts General Hospital, a Massachusetts not-for-profit, 501(c)(3) tax-exempt corporation having a principal place of business on Fruit Street in Boston, Massachusetts, to be used for its general purposes.

Restricted Bequest

You can designate your bequest to support a specific purpose, such as research of a particular disease.

• RESTRICTED BEQUEST LANGUAGE

I give, devise and bequeath the sum of \$____ [or percentage of the estate, description of the asset, etc.] to Massachusetts General Hospital, a Massachusetts not-for-profit, 501(c)(3) tax-exempt corporation having a principal place of business on Fruit Street in Boston, Massachusetts, to be used for the following purpose: [State the purpose.] If at any time in the judgment of the trustees of Massachusetts General Hospital it is impossible or impracticable to carry out exactly the designated purpose, they shall determine an alternative purpose as near as possible to the designated purpose.

OTHER ESTATE GIFTS

Retirement Accounts

You can name MGH as a beneficiary of qualified retirement plans, such as 401(k)s, 403(b)s, Individual Retirement Accounts, Keoghs or pension plans. You maintain complete control over the assets while living, and at your passing, MGH receives a portion or all of the remaining funds in the plan.

Life Insurance

You can name MGH as the owner and beneficiary of a life insurance policy. You receive a charitable income tax deduction based on the lesser of the policy's fair market value or the net premiums paid. You also may make a gift of a paid-up policy, resulting in a charitable income tax deduction for the policy's cash surrender value.

THE PHILLIPS SOCIETY

Donors who include MGH in their will, name the hospital as a beneficiary of a retirement plan or life insurance policy, or make another type of planned gift become members of the Phillips Society. These committed friends of the hospital carry on the tradition of giving and ensure that exceptional care, pioneering research and medical education programs continue.

Membership benefits include:

- Recognition in the annual *MGH Donor Report*
- Invitations to the annual Phillips Society event and other special events
- Mailings and publications featuring current MGH news
- The satisfaction of helping future generations of MGH patients and caregivers



Yes! I want to help MGH continue its tradition of healthcare excellence.

Please send me information about:

- Bequest Gifts
- Retirement Plans/Life Insurance Gifts
- Gifts that would provide me with an income for life
- Making an outright gift to the MGH Fund

MGH is a place
where miracles occur.
Help ensure this for
generations to come.



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For More Information

Join MGH in its ongoing quest to deliver outstanding health care, now and in the future.

Visit our web site for additional details, to use our complimentary life income gift calculator or to learn more about planned giving opportunities.

Massachusetts General Hospital
Office of Planned Giving
165 Cambridge Street, Suite 600
Boston, MA 02114-2792

Phone: 617-726-2200
Toll free: 1-877-644-7733

E-mail: mghdevelopment@partners.org
Web site: www.mghgifts.org

If you would like to be removed from our mailing list of fund-raising materials designed to support MGH, please write to us at the above address.

Cover Photo: Mrs. Christine Cook and Matthew Smith, MD, director of Genitourinary Medical Oncology. Mrs. Cook, an MGH patient for more than 40 years, has generously provided for MGH in her estate plan. Her bequest will support cancer research and recognizes the compassionate care that Dr. Smith and other Cancer Center physicians and nurses gave to her husband, James Cook.



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- Retirement Plans / Life Insurance Gifts
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For gift calculation purposes, my age is _____, and the age of my second beneficiary (if applicable) is _____.

I Have Remembered MGH in My Estate Plan

- Please enroll me in the Phillips Society and list my name as _____
- I prefer to remain anonymous

**PLEASE PRINT THE FOLLOWING
INFORMATION:**

Name

Street Address

City/Town

State

Zip Code

Daytime Phone

Evening/Weekend Phone

Cellular Phone

E-mail Address Please provide your e-mail address to receive periodic e-mail communications from us.

Best Day/Time to Call

For questions, please contact:
Massachusetts General Hospital
Office of Planned Giving
165 Cambridge Street, Suite 600
Boston, MA 02114-2792

Phone: 617-726-2200
Toll Free: 1-877-644-7733

E-mail: mghdevelopment@partners.org
Web site: www.mghgifts.org

Thank you for supporting
Massachusetts General Hospital.



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