

# LEGACY MATCH CAMPAIGN



## Overview

The Legacy Match Campaign is designed to inspire our donors to make estate commitments for the future, which are then matched by current gift dollars for vital Children's Health<sup>SM</sup> programs. This program allows you to leverage your estate gifts to help future generations of children and meet our current needs. The campaign will support Children's Health during North Texas Giving Day — an annual online giving event on Sept. 23 that inspires individuals to give back to the community and support causes close to their hearts. When you make a legacy gift from Aug. 1 through Sept. 23, you are making life better for children across North Texas.

## How It Works

**Step 1:** Name Children's Health in your will, living trust, beneficiary of your retirement plan or insurance policy. You also can create a charitable gift annuity or charitable remainder trust for the benefit of Children's Health. Estate gifts, which are already in place but have not been shared with us, can qualify, too.

**Step 2:** Please change to Download the Legacy Challenge Campaign Gift Confirmation form at [childrens.com/legacymatch](https://childrens.com/legacymatch).

**Step 3:** Once we receive your notification form, a current match of 10 percent of the value of your future gift – up to a maximum amount of \$25,000 – will be available for you to direct to the hospital program of your choice. We will contact you to identify the program you prefer, and the gift will be made to the program in your honor. If you prefer to keep the estimated value of your gift private, a donation of \$1,000 will be made in your honor.

## FAQ's

### What kinds of gifts qualify for the Legacy Gift Challenge 2021 Match?

Planned gifts eligible for the match include bequests in a will or trust, such as beneficiary designations from retirement accounts or life insurance. Other options include charitable gift annuities or commercial annuities, transfer on death for bank accounts, real estate or DAFs.

### Who do I inform at Children's Health of my plans?

Gifts can be shared with your relationship manager or returned directly to Children's Health by using the Legacy Challenge Campaign Gift Confirmation Form. This is available on our website at [childrens.com/legacymatch](https://childrens.com/legacymatch) or by contacting Nicola Lawrence, Director of Legacy and Gift Planning, at 469-744-1986.

### Where can I direct the match?

The match can be directed to your choice of our five priority designations: Children's Health Greatest Need, Research, Enhancements to Children's Health Dallas Campus, Expansion to Children's Health Plano Campus or Mental and Behavioral Health Programs. Your future legacy gift can be designated to one of these four areas or an area of your choosing, including your existing endowment.

### Why create my legacy plan now?

By sharing your legacy intentions now, you are helping Children's Health make a difference now through our North Texas Giving Day campaign and joining others to ensure future world-class care for the children of our community. Most importantly, your gift also makes certain those you love are provided for. It is especially important in 2021 to consider your estate plans as we all look toward the proposed changes in estate and capital gains taxes. If you would like information on how to plan effectively, please call Nicola Lawrence at 469-744-1986. Alternatively, visit [childrens.com/mywill](https://childrens.com/mywill) to make a free will or share your beneficiary designations.

### How much will be matched?

When you make a gift, 10 percent of the confirmed gift amount up to \$250,000 (maximum of \$25,000) will be matched. For example, if you put a \$100,000 gift in place, you can designate \$10,000 for a current use and secure your future gift to Children's Health for \$100,000.

**For any questions about the match opportunity or how to plan your gift, please contact Nicola Lawrence, Director of Legacy and Gift Planning at 469-744-1986 or [nicola.lawrence@childrens.com](mailto:nicola.lawrence@childrens.com).**