

A GIFT THAT
BENEFITS
YOU AND THE
FUTURE OF
MEDICINE



Dartmouth
Cancer Center



Dartmouth
Health



Dartmouth
GEISEL SCHOOL OF
MEDICINE

At Dartmouth Health and the Geisel School of Medicine at Dartmouth, we are working to provide expert medical care, explore new ways to combat diseases, and educate the next generation of medical leaders. By including Dartmouth Health and Geisel in your estate plans, you are *transforming the lives of patients and their families for generations to come.*



Your planned gift can be included in 2024 Prouty fundraising totals, and will be matched 1:1 thanks to the generous Jack & Dorothy Byrne Foundation.

GIFTS THROUGH YOUR WILL OR TRUST

Making a charitable gift, or bequest, from your will or trust costs you nothing today but provides support to Dartmouth Health and Geisel after your lifetime. This flexible option can be revised at any time, and be structured to fit your personal situation.

IT'S STRAIGHTFORWARD.

A simple change to your will or trust allows you to make a lasting gift to Dartmouth Health and Geisel.

IT'S FLEXIBLE.

You are able to maintain control of your current assets while making a future gift. If life circumstances change, you can easily revise your will or trust.

IT'S IMPACTFUL.

Support a specific program with your future gift, or leave it unrestricted for Dartmouth Health and Geisel's greatest need.



“My wife and I have created a bequest to Geisel to provide for ethics teaching to help foster the complete physician.”

Professor Bill Nelson
Elizabeth DeCamp
McInerney Professor



ACCOUNT AND BENEFICIARY DESIGNATIONS

Designating Dartmouth Health and Geisel as the beneficiary of your assets is an easy, and tax-efficient, way to support our mission of advancing research, education, and lifesaving care. In most cases, the process only requires completing and submitting a “new beneficiary designation form.”

IRAS AND RETIREMENT PLANS.

A gift of retirement asset is among the most tax-efficient ways to make an estate gift, as 100% of the funds are available for charitable purposes.

BANK ACCOUNTS & BROKERAGE ACCOUNTS.

You can instruct your bank or investment account to donate all, or a portion, of your account to Dartmouth Health and Geisel upon your death.

LIFE INSURANCE POLICIES.

Simply name Dartmouth Health and Geisel as a beneficiary of the death benefit associated with your policy—or you can transfer ownership of the policy during your lifetime.





CHARITABLE GIFT ANNUITIES

A charitable gift annuity (CGA) provides you with fixed income for life, in exchange for a gift of cash or securities to Dartmouth Health and Geisel. Not only does this provide you with annual income and allow us to further our work, but also can qualify you for a variety of tax benefits.

INCOME.

Increase your income with fixed, dependable annuity payments each year for the rest of your life.

TAXES.

Qualify for income tax charitable deduction for a portion of your gift's value, depending on your tax situation.

DEFERRED GIFT ANNUITIES.

If you are younger than 60 or don't need payments immediately, you can setup a deferred gift annuity.

CHARITABLE REMAINDER TRUSTS



“We were delighted to create the Weg Distinguished Professorship in Cancer with our donor advised fund. It was easy to do and we know this is a decision that makes a difference.”

Carol and Ken Weg D’60

A charitable remainder trust is an irrevocable trust funded with cash or appreciated assets. The trust makes regular payments to you for life. At the end of the trust term, the remaining amount is used by Dartmouth Health and Geisel to support our mission.

UNITRUST.

A charitable remainder unitrust is the most popular form of charitable remainder trusts. It pays you, each year, a variable amount based on a set percentage of the value of your trust assets.

ANNUITY.

A charitable remainder annuity unitrust is a less common choice. This type of trusts pays you, each year, the same dollar amount you choose at the start.

Contact our Office of Planned Giving to see which type of charitable remainder trust best fits with your estate plan.





MORE WAYS TO GIVE

Making a charitable gift, or bequest, from your will or trust costs you nothing today but provides support to Dartmouth Health and Geisel after your lifetime. This flexible option can be revised at any time, and be structured to fit your personal situation.

IRA ROLLOVER.

If you are 70½+, you can give any amount per year from your inherited retirement account (IRA) directly to Dartmouth Health and Geisel without having to pay income taxes on the money.

DONOR ADVISED FUND.

A donor advised fund (DAF) gives you the flexibility to recommend how much and how often money is granted to Dartmouth Health, Geisel, and other charities.

CHARITABLE LEAD TRUST.

A charitable lead trust makes annual payments to Dartmouth Health and Geisel, and the remaining assets are given to you or your heirs at the end of the trust term.



“I believe in The Prouty and know that the funds raised truly make a difference. I wanted to do something, and including the Friends of Dartmouth Cancer Center in my estate plans through The Prouty is my way of supporting the future needs of cancer patients in our community.”

Deb Nolen
Friends of Dartmouth
Cancer Center Board
of Directors

You're Invited!

The Pinnacle Society celebrates friends who have created a legacy of giving that advances medical care and education by including Dartmouth Health and Geisel in their estate plans through a will, trust, retirement plan, life-income gift, or other planned gift.

We invite you to join this special group of friends by extending your support of Dartmouth Health and Geisel's life-changing work with a planned gift. Become a member of the Pinnacle Society today and create a better tomorrow.

PINNACLE SOCIETY

To learn more or to let us know you've already included us in your estate plans, please contact:

Katie Blackman
Director, Planned Giving
603-646-5808
Katherine.D.Blackman@dartmouth.edu

For more information, visit: DHGeiselPlannedGiving.org

Dartmouth Cancer Center



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