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We value and appreciate the wealth of expertise that you bring to your clients and want to support your efforts in providing them resources and counsel when it comes to their philanthropic planning. Our goal is to help keep you – for the benefit of your clients – informed of and inspired by the work happening at Spectrum Health and Helen DeVos Children’s Hospital.

We believe that charitable planning is a process that ideally involved the donor, professional advisors, and our planned giving team. We look forward to partnering with you in a way that ensures your clients find the most meaningful gift that meets their charitable goals. Please be assured that discussions are strictly confidential and there is no obligation associated with these conversations.

Feel free to contact our planned giving team for more information or assistance:

Kristin Long MPA, CFRE, CAP®  
Kristin.Long@spectrumhealth.org  
616-485-6590

**Legal Name:** The legal name to use in the creation of estate planning documents to provide for Spectrum Health is **Spectrum Health Foundation, Grand Rapids, Michigan**. Alternately, the legal name to use in the creation of estate planning documents to provide for Helen DeVos Children’s Hospital is **Helen DeVos Children’s Hospital Foundation, Grand Rapids, Michigan**.

**Federal Tax ID#:** The federal identification number for Spectrum Health Foundation and Helen DeVos Children’s Hospital Foundation is **#38-2752328**

*\*Both Spectrum Health Foundation and Helen DeVos Children’s Hospital Foundation are qualified charities with I.R.S. code 501(c)(3) status. Proof of status will be furnished upon request.*

**Location:** 100 Michigan Street NE, Suite 4100, Grand Rapids, Michigan 49503

**Bank Wire Transfer Instructions for Stock & Securities:**

*\*Please email Greg.Workman@spectrumhealth.org or call 616.391.5409 with the date of transfer, stock name, and number of shares.*

**Broker:** Charles Schwab & Co.

**DTC#:** 0164

**Account:** 2194-0924

**Account Name:** Spectrum Health Foundation

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**Bequest Gifts through Will/Trust:** If your client is interested in supporting Spectrum Health or Helen DeVos Children's Hospital through a bequest in their will/trust, we have created the following sample bequest language as a helpful resource.

- 1. Residual Bequest Language.** A residual bequest comes to the Spectrum Health Foundation after estate expenses and specific bequests are paid:

*We give and devise to Spectrum Health Foundation (Tax ID #38-2752328), located in Grand Rapids, MI, all (or state a percentage) of the rest, residue, and remainder of our estate, both real and personal, to be used for its general support (or for the support of a specific fund or program).*

- 2. Specific Bequest Language.** Naming the Spectrum Health Foundation as a beneficiary of a specific amount from the estate:

*We give and devise to Spectrum Health Foundation (Tax ID #38-2752328), located in Grand Rapids, MI, the sum of \$\_\_\_\_\_ (or asset) to be used for its general support (or for the support of a specific fund or program).*

- 3. Contingent Bequest Language.** Spectrum Health Foundation can be named as a contingent beneficiary in a will or personal trust if one or more specific bequests cannot be fulfilled:

*If (insert name) is not living at the time of our demise, we give and devise to Spectrum Health Foundation (Tax ID #38-2752328), located in Grand Rapids, MI, the sum of \$ \_\_\_\_\_ (or all or a percentage of the residue of our estate) to be used for its general support (or for the support of a specific fund or program).*

- 4. Alternative Purpose Language.** Recognizing that health care evolves to meet changing needs of future generations, your client may wish to grant Spectrum Health Foundation or Helen DeVos Children's Hospital Foundation the authority to respond to those changing needs. They may do this by including the following language with their bequest:

*If at any time in the judgment of Spectrum Health Foundation or Helen DeVos Children's Hospital Foundation, it is impossible or impracticable to carry out the designated purpose, the Foundation shall determine an alternative purpose as near as possible to the designated purpose.*

Information contained herein was accurate the time of posting and is taken from sources believed to be reliable. The information on this website is not intended as legal or tax advice; for such advice, please consult an attorney or tax advisor. Figures cited in any examples are for illustrative purposes only. References to tax rates include federal taxes only and are subject to change. State law may further impact your individual results. You are encouraged to seek the advice of your financial planner, attorney, and/or tax advisor to make certain a contemplated gift aligns with your overall circumstances and planning. All conversations are confidential; no obligations are associated with these conversations.