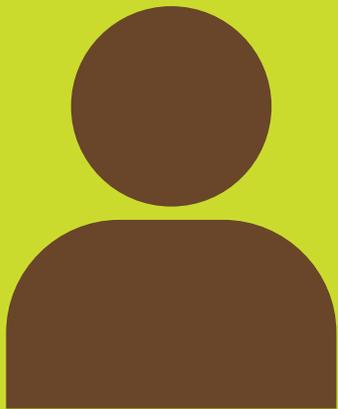




BEVERLY E. COLEMAN

NEVADA HEALTH
FOUNDATION



PLANNED GIVING

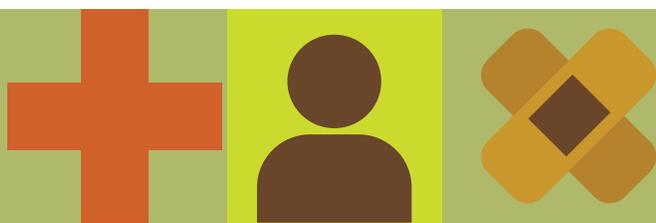
providing access to
quality healthcare for all

OUR STORY: Putting better health within reach

The Beverly E. Coleman Nevada Health Foundation drives critical fundraising and development efforts to advance Nevada Health Centers' mission of providing access to quality healthcare throughout Nevada.

The Nevada Health Foundation, began in earnest in 2017. At the outset, longtime northern Nevada resident Beverly E. Coleman was tapped to lead this important venture. With her unexpected passing June 2019, we found it fitting and aspirational to pay tribute to Beverly's legacy and love of philanthropic pursuits by adopting a new name: The Beverly E. Coleman Nevada Health Foundation.

Those privileged to engage with Beverly personally and professionally knew an intelligent, kind-hearted person who cherished her community, embodied compassion, and pursued her work with enthusiasm. Beverly made our world inarguably brighter and we are honored to carry forward the work she began on behalf of the foundation.



4 PILLARS OF GIVING

BEVERLY E. COLEMAN

- Endowment Fund
- Legacy Society
- Assistance Program
- Recurring Giving Program

ENDOWMENT FUNDS GOALS

- Increase unrestricted funds.
- Grow the Endowment return on investment.
- Support operating expenses.
- Support annual budget.
- Investment the current funds.
- Increase investment earnings by 5-10% a year

BEVERLY E. COLEMAN ENDOWMENT FUND

The Beverly E. Coleman Endowment fund is a pool of financial assets donated to Nevada Health Centers through the Nevada Health Foundation arm. These funds are invested to generate income, and the principal amount remains intact to ensure the fund's sustainability over time. The generated income supports the institution's ongoing operations, projects, potential scholarships, patient assistance funds and other financial needs.

Key features of Endowment Fund include:

Principal Preservation:

The original donation, or principal, is usually kept intact, while the investment returns may be used for the organization's needs.

Investment Strategy:

Endowment funds are invested in a diversified portfolio to balance risk and return, ensuring long-term growth and stability.

Spending Policy:

The endowment fund will potentially follow a spending policy determining how much of the investment income can be used yearly. This policy ensures that the endowment continues to support the organization in perpetuity.

Donor Restrictions:

Donors may restrict how their contributions can be used. These restrictions are honored by the Nevada Health Centers organization.

APPROVED
JANUARY 14TH,
2021

\$366,705.15
ESTABLISHED
INTEREST
-EARNING

TRANSITION
MARCH 22ND,
2022

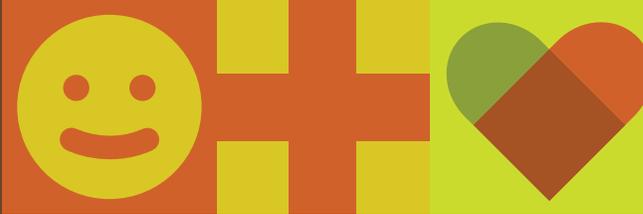


LEAVING A LEGACY

- Estate Planning
- Will
- Living Trust
- Assets or Bequests*
- Non-Probate Transfer
- Non-Cash Asset

THE ADVANTAGES OF PLANNED GIVING

- Providing gift plans that benefit you and your family
- Bringing immediate and deferred tax advantages to both you and your heirs
- Having a meaningful impact on Nevada Health Foundation and our goals and interests beyond your own lifetime and far into the future
- Opportunity to be included in our Beverly E. Coleman Legacy Society



BEVERLY E. COLEMAN LEGACY SOCIETY

Through the Beverly E. Coleman Legacy Society, the donor may receive immediate benefits, while the actual transfer of assets may be deferred. Through this planned giving method, the donor's primary interest is to make a gift that will benefit Nevada Health Centers, patients, and programs directly. Careful thought and consideration will be given to donors when planning their charitable gifts. We always welcome an outright cash gift to meet your philanthropic goals; however, we also recognize that different people have different financial concerns, and an outright gift may not be the best choice. Planned gifts are normally arranged in consultation with a donor's estate or financial planners. We are happy to talk with you and your advisors to arrange a gift that will align with your giving needs.



*Includes securities, real estate or real property, bequest intention, bequest expectancy or other.

OVERVIEW WAYS TO GIVE

The easiest way to make a bequest to the Nevada Health Foundation is through your will or living trust. You can list a specific dollar amount or a particular asset, such as securities or real estate, or leave a percentage of your estate or the residual of your estate after providing for loved ones.



Example

Specific Amount of Asset:

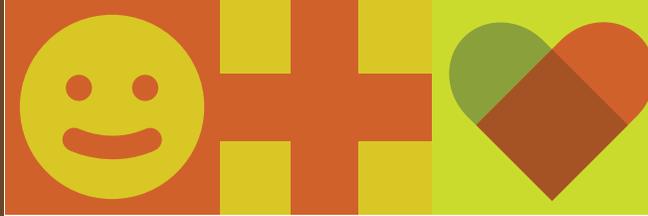
I give, devise, and bequeath to the Nevada Health Foundation the sum of \$_____ [or a description of the specific asset] for its general purposes.



Example

Remainder of Estate:

I give, devise, and bequeath to the Nevada Health Foundation all [or state the fraction or percentage] of the rest, residue, and remainder of my estate, both real and personal, for its general purposes.



BEVERLY E. COLEMAN ASSISTANCE PROGRAM

- Patient Assistance Fund
- NVHC Programs (Including Pharmacy Co-Pay Assistance)
- Program Assistance Fund
- NVHC Educational Assistance Fund
- NVHC Goodwill Fund
(NVHC Associates/Employee Support, Emergency Assistance)
- Other



BEVERLY E. COLEMAN RECURRING GIVING PROGRAM

- Internal
 - NVHC Employee Payroll Deduction Program
(Est. 2016-Present)
- External
 - Giving is Good Medicine Individual
Donor Recurring Giving Program



DONOR LEVEL CUMULATIVE GIVING

LEGACY \$1M

Tours, Call from CEO, Full page listing on digital donor boards, Admitted to Patron Circle, Plaque presentation and recognition at Annual Foundation Luncheon, Advisory Opportunities

HERO \$500,000

Recognition at Annual Signature Event, Lunch with CEO and BOD Chair, Invitations to Press Conferences/ Events

VISIONARY \$100,000

Call from CEO or CMO, Invitation to Annual Foundation Luncheon

PARTNER \$50,000

Foundation merch box, call from VPED, Two Tickets to Signature Event, Cultivation meeting with Development Officer and VPED

ADVOCATE \$10,000

Assigned to Development Officer, Handwritten card, Cultivation meeting with Development Officer /Invitation to join Patron Society, Save the Date for Signature Event

SUSTAINER \$1,000

Anniversary Card, Listing on Digital Donor Wall (located in hub locations MLK, EFMDC, Sierra Nevada)

ANGEL \$500

Gift receipt, Thank you letter, Welcome packet, Annual Impact Report, Holiday Card





BEVERLY E. COLEMAN

NEVADA HEALTH
FOUNDATION

NEVADAHEALTHFOUNDATION.ORG

