HUDSON HEADWATERS
HEALTH NETWORK

Planned Giving By Will (Bequest)

A bequest by Will to Hudson Headwaters Health Network is a way of perpetuating your support for high-quality primary care in the communities it serves.

Through such a testamentary bequest, you may leave to Hudson Headwaters a specific dollar amount (for example, $10,000) or reserve a certain percentage of your estate after provisions for family members and other beneficiaries have been made. Your bequest to Hudson Headwaters will qualify your estate for a charitable deduction equal to the entire amount of the bequest (at the time such bequest is realized by Hudson Headwaters).

An unrestricted bequest for the general purposes of Hudson Headwaters is the simplest and most useful kind of bequest. It allows Hudson Headwaters to decide the most efficient and valuable use of your gift at that time, as needs may shift over time. Or, if you prefer, you may restrict the use of the bequest to a particular charitable use or effort, for example, a particular health center or program (please see Attachment A). Please note: if a bequest is earmarked for a particular use, care must be taken to ensure that the limitations do not jeopardize the tax deductibility of your bequest. We encourage you to consult a lawyer in drafting such language.

Your bequest can also be made in the form of a charitable remainder trust in your Will, allowing you to provide income for individuals you wish to benefit for a certain period of time, after which the remainder of the bequest will pass to Hudson Headwaters.

Bequests may be of cash, securities, real estate, works of art, as well as other kinds of assets. They may be made in honor or memory of another individual. There is no limitation on the size of the bequest, big or small.

Suggested Forms of Bequests

When making or revising a Will or other testamentary document, such as a trust agreement, you should obtain the assistance of an attorney. The following models may be included in a Will or other testamentary document to make various types of bequests.

LEGAL DESIGNATION:
If you wish to name Hudson Headwaters in your Will or estate plan, we should be named as follows:

HUDSON HEADWATERS HEALTH NETWORK
9 Carey Road, Queensbury, NY 12804

Our tax identification number is: **[14-1628237].**

1. Unrestricted bequest:

(a) Specific dollar amount:

"I bequeath the sum of _____ Dollars ($_____) to the HUDSON HEADWATERS HEALTH NETWORK, 9 Carey Road, Queensbury, NY 12804, to be used or disposed of as its Board of Directors in its sole discretion deems appropriate."

(b) Specific personal, tangible property (such as artwork, etc.):

"I bequeath to the HUDSON HEADWATERS HEALTH NETWORK, 9 Carey Road, Queensbury, NY 12804, [all of my] [such of my] _____ to be used or disposed of as its Board of Directors in its sole discretion deems appropriate."

(c) Specific real property:

"I devise all of my right, title and interest in the real property located at _____ to the HUDSON HEADWATERS HEALTH NETWORK, 9 Carey Road, Queensbury, NY 12804, to be used or disposed of as its Board of Directors in its sole discretion deems appropriate."

(d) Share of, or entire residue, of estate:

"I devise and bequeath [all] [or] [_____%] of the remainder of my estate to the HUDSON HEADWATERS HEALTH NETWORK, 9 Carey Road, Queensbury, NY 12804, to be used or disposed of as its Board of Directors in its sole discretion deems appropriate."

2. Restricted bequest:

If your donation is for a purpose other than Hudson Headwaters' unrestricted use, insert the restriction in place of the words "to be used or disposed of as its Board of Directors in its sole discretion deems appropriate." *Please see Attachment A: Applicable Bequest Restrictions for more information.*

"I bequeath the sum of _____ Dollars ($_____) to the HUDSON HEADWATERS HEALTH NETWORK, 9 Carey Road, Queensbury, NY 12804, for the following charitable use and purpose: _____.

In the event a gift is subject to a restriction, we suggest also including one of the following provisions:

"However, I impose no legal or equitable obligation in this regard."

or

"If in the judgment of the Board of Directors of Hudson Headwaters, it becomes impossible to accomplish the purposes of this bequest or it is no longer practicable or appropriate, the income or principal may be used for such related purposes and in such manner as determined by its Board of Directors, giving consideration, where possible, to my special interest as described above."

For further information, contact:

Jessica Rubin, Vice President, Chief Impact Officer
Hudson Headwaters Health Network
9 Carey Road, Queensbury, NY 12804
518-703-9554 **jrubin@hhhn.org**

When considering any charitable gift planning, please consult with your tax or financial advisor to understand the tax and financial implications. Hudson Headwaters does not provide legal or tax advice. This document is intended for informational purposes only and should not be used as legal or tax advice.

HUDSON HEADWATERS HEALTH NETWORK

Attachment A:

Applicable Bequest Restrictions

Health Center Locations
Bolton Health Center
Champlain Family Health
Chester-Horicon Health Center
Family Health at Lake Placid
Glens Falls Family Health
Health Center on Broad Street
Moreau Family Health
Moriah Health Center
North Creek Health Center
Pediatric and Adolescent Health
Plattsburgh Family Health
Plattsburgh Pediatric and Adolescent Health
Saranac Lake Family Health
Schroon Lake Health Center
Ticonderoga Health Center
Tupper Lake Family Health
Warrensburg Health Center
West Mountain Family Health
West Mountain Specialty Care
Hudson Headwaters Women's Health

Service Lines/Programs
Behavioral Health
Dental
Medical Education/Tuition Assistance
Mobile Health
Pediatrics
The Rugge Center for Community Impact
Upstream Fund
Women's Health
Pathways (Homeward Bound, Palliative Care)

For any restrictions not on this list, please email the development office at: **development@hhhn.org**