



Edna Gallagher Haywood— Her Legacy of Caring for Our Community

In 1930, a young nurse named Edna Gallagher Haywood opened a 6-bed hospital in a small two-bedroom bungalow at 2540 East Street, the site of John Muir Health, Concord Medical Center today. Born in Elko, Canada, 19-year-old Edna Gallagher arrived in Concord, California in 1926. She was already a registered nurse and married mailman James Haywood, whose parents owned a small gas station on Willow Pass Road, as well as some acreage in San Francisco. With the help of a \$1,200 loan from her father-in-law, Edna and local physician Henry Stirewalt, M.D. started a tradition of quality and compassionate medical care that continues to serve patients, families and our community today.



As a young nurse, Edna Haywood (inset) started a tradition of caring for her community that is carried on today by her great-granddaughters (L-R) Danielle Stewart, Breanna Feliciano, Genelle Cadloni, Ashley Ellington, Brittani Fry and Becca Cadloni.



She once told me that you can do anything you put your mind to. I felt she was my greatest supporter. She bestowed in me a determination and willingness to try anything and take a chance. Because of her I also became a Registered Nurse.”

—Renée Diekroetger
Granddaughter of Edna Haywood

John Muir Health’s First Legacy Gift

According to Haywood family oral history, a sea captain named Barney made an arrangement with Edna Haywood when she was seeking funds to add a new wing to the hospital. He promised to give her all his money and fund her vision on the condition that he be allowed to live at the hospital until he died. Reportedly, Barney had a bed and became part of the everyday landscape of the hospital. Even after Edna sold the hospital, this arrangement was honored and he remained living there until he died.

Watch a film about Edna Haywood:
<https://vimeo.com/187265564>



Welcome to Legacy! Sharing Our Vision and Values



Michael G. Crvarich, CPA
Vice President
Legacy & Principal Gifts

Welcome to the inaugural issue of John Muir Health Foundation's newest publication, Legacy. This semi-annual newsletter is designed to share with you a values-based approach to philanthropy that seeks to care for you and your heirs, connect your lifetime values with estate planning decisions, and provide education on ways in which your philanthropic objectives can be achieved for the benefit of the common good and John Muir Health.

My philosophy that I would like to share with you is that a meaningful charitable Legacy is often found at the intersection of where the vision and values of an individual overlap with the vision and values of a chosen charity. A legacy gift designed from the perspective of shared vision and values achieves its goal of inspiring, empowering and leading individuals, families and communities.

Legacy gifts are indeed gifts of a lifetime!

To assist you in charting such a course, every issue of this newsletter will focus on a core value of John Muir Health as illustrated in the compass rose (at left). This inaugural issue focuses on the value of **Care**, which is at the essential heart of health care, philanthropy, and Legacy planning.

I look forward to exploring the many benefits of Legacy gifts with you and invite you to contact me with any questions, comments or ideas for future newsletters you might have. Please feel free to contact me directly at (925) 941-2120 or email me at michael.crvarich@givehealthjmh.org.



CREATE YOUR LEGACY GIFT

Charitable estate planning can be financially beneficial for families and individuals of various ages and income levels. Find out what planning a Legacy Gift to John Muir Health can do for you and your loved ones—now and in the future.

GIFTS JOHN MUIR HEALTH CAN USE TODAY

- Appreciated Securities (see back cover)
- Real Estate

GIFTS THAT CAN PAY YOU INCOME

- Charitable Gift Annuity
- Charitable Remainder Trust

GIFTS THAT TAKE EFFECT AFTER YOUR LIFETIME

- Bequest
- Retained Life Estate
- Charitable Beneficiary Designations
- Retirement Plan
- Life Insurance

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OR LEARN MORE AT:
www.givehealthjmh.org/legacy



Your Legacy Matters

In the past year, John Muir Health Foundation has received over \$2 million in realized estate gifts from donors who expressed their vision for improving the health of our community through legacy giving. With gratitude we share with you some of these donors who have ensured a lasting legacy of support for the mission of John Muir Health through their will or trust:

- ▶ In gratitude for the patient care they received, **Jack and Patsy Brown**, made a provision in their will to provide funding to Cancer Services.
- ▶ To ensure that all patients at John Muir Health “feel safe and well cared for,” a thoughtful bequest from the estate of **Audrey Huron** will provide ongoing support for nursing education and training.
- ▶ The proceeds from a Charitable Remainder Trust established by **Frank and Ellen Gatto** will create an endowment in their name to meet the highest and greatest needs of John Muir Health.
- ▶ A gift from the estate of **Myrtle McGrew** provided additional funding for the Myrtle McGrew Endowed Fund which was established during her lifetime to provide sustained funding for Cardiovascular Services.
- ▶ A generous gift from the estate of **Olga Tarshis** will add to the Carl Gracely Pastoral Care Endowment Fund to strengthen the delivery of compassionate and quality care to our patients.

John Muir Health Foundation 5th Annual Legacy Brunch

The Foundation’s annual Legacy Brunch is an elegant, yet relaxed event designed to thank the very special donors who have included John Muir Health in their estate plans, along with longtime loyal annual donors. At this year’s event, “Celebrating Your Legacy—Gifts of Transformation and Healing” on June 11, guest speakers Julie Long and Richard Del Monte shared inspirational personal stories about how Legacy gifts directly support the transformational and healing patient care and services that John Muir Health provides.

Author and Foundation Board Vice Chairman Richard Del Monte spoke about the transformational power of philanthropy and the valuable opportunity it presents to inspire and foster unity and greater connection among family members.



Former John Muir Health patient and breast cancer survivor Julie Long expressed her gratitude for the Legacy gift of longtime donors Jack and Patsy Brown, which helped fund the advanced 3-D mammography technology that detected her cancer and saved her life.



(L-R) Shriram and Rupa Parikh and Vipin Kapadia.



(Clockwise from bottom left) Janet Saunders, Roy Kaplan, M.D., Esper Hagberg, Joyce and Jerry Stroffolino, John and Katie Moore, Marcia Graves and Maria Hernandez.



Jane Willemsen, Executive Vice President and President, Hospital Operations, John Muir Health, with Legacy donor Bill Sabin.



Daniel Lapporte with dad Seymour Lapporte, Ph.D.

A Will Can Be a Beautiful Thing

If you have been putting off estate planning because it is sad or uncomfortable, don't. Estate Planning can be a loving tribute and source of comfort. Here's what to consider.

- Estate planning may make people uneasy because it deals with death and the distribution of assets. However, it can give people incredible peace of mind.
- The first step in estate planning is a will or living trust. A 2016 survey by Harris Poll found that **64% of American adults do not have a will**. Either they thought they didn't need one or they just never got around to it.
- Estate planning documents are flexible and dynamic. They can be easily changed as your personal or financial circumstances change.
- It is important to communicate with loved ones your exact wishes in the event you are unable to make medical decisions for yourself.
- Do you have hopes for your family you want to make known? Consider writing an "emotional will". It isn't legal, but it's a place where you can share your thoughts, memories, and hopes for your loved ones as a lasting remembrance of your life.
- A charitable gift in your estate plan is a way of communicating some of your core values to generations that will come after you.

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Blue Ocean Global Wealth



HOW TO DESIGNATE A GIFT

The simplest way to give to John Muir Health through a will or trust is by a charitable bequest. A charitable bequest is a designation in your will that gives a person or charity:

- A particular asset (i.e. a piece of property)
- A set amount of money (i.e. \$10,000)
- The residuary estate (what is left over after provisions for loved ones have been met)

When referring to John Muir Health in your will or other beneficiary designation, please use:

John Muir Health Foundation
Tax Identification Number 94-2650855

Donating Stock to Charity

Increase Your Gift to John Muir Health Foundation and Your Tax Deduction With One Simple Strategy

Make a bigger impact by donating long-term appreciated securities, including stock, bonds, and mutual funds. Compared with donating cash, or selling your appreciated securities and contributing the after-tax proceeds, you may be able to automatically increase your gift and your tax deduction.

A LARGER GIFT AND A LARGER DEDUCTION

Consider this example of donating stock directly to John Muir Health Foundation, compared to selling your stock and donating the cash proceeds: Making a gift of stock directly to the Foundation can result in a substantially larger benefit for John Muir Health and for you!

Transfer instructions for stock gifts as in Option 1:

John Muir Health Foundation
Acct # 4761-3255
DTC # 0164
Charles Schwab & Co.

HOW DOES IT WORK?

It's simple and easy. When you donate stock to charity, you'll generally take a tax deduction for the full fair market value. And because you are donating stock, your contribution and available deduction may increase nearly 20%. Would you prefer to donate bonds or mutual funds? The same benefits apply.

