



## Winona Health Foundation Vision

*To sustain Winona Health as an exceptional provider of locally owned, nonprofit healthcare.*

## Winona Health Foundation Mission

*To gather, steward and distribute resources needed to support and advance the mission of Winona Health and its affiliates.*

## Winona Health Foundation Fund Options

- Area of Greatest Need
- Adith Miller & Roger Metz Manors
- Ben & Adith Miller Patient Care
- Breast Cancer
- Cancer Care
- Cardiac Rehab
- Community Care Network
- Dialysis
- Employee Relief
- Employee Scholarship
- Family Birth Center
- Hospice
- Lake Winona Manor
- Memory Care
- R.W. Miller Education
- Watkins Manor
- Winona Clinic
- Winona Health Way

Please contact us for additional fund options.



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[winonahealth.org/foundation](http://winonahealth.org/foundation)



## Planned Giving

*A legacy for life...*



Photo courtesy of Mary Farrell at Visit Winona.

## What We Do Matters

The Winona Health Foundation secures funding to support and enhance services for individuals and families in our community.

- **A Culture of Generosity**  
We actively seek to expand our base of family, friends and neighbors who support the vision of providing excellent healthcare in our community.
- **Community Engagement**  
We sponsor special projects and educate the community about the Foundation and Winona Health services and programs.
- **Access to Healthcare**  
We provide access to high-quality healthcare based on need, regardless of ability to pay.
- **A Passion for Excellence**  
We invest in equipment, facilities, technology and training essential to sustain innovation in the practice and delivery of healthcare in our community.

## Options for Giving

- **Bequests**

You can provide now for a future gift to the Winona Health Foundation by including a bequest provision in your will or revocable trust. Your bequest can be a specific dollar amount, asset or percentage of your estate. Example language would read: “I give and bequeath to the Winona Health Foundation, a Minnesota nonprofit corporation located in Winona, Minnesota, the sum of \_\_\_\_\_ (or the property described below or \_\_\_\_\_% of my residual estate) for use in furthering the charitable purpose of the Winona Health Foundation.”

- **Securities**

When you transfer stock to the Winona Health Foundation, you may receive a charitable deduction based on the stock’s current market value but avoid paying capital gains tax. The Foundation also accepts gifts of closely held stock and mutual fund shares.

- **Life Insurance**

Your life insurance policy can be used to make a gift in one of two ways. The first is as easy as naming the Winona Health Foundation as a beneficiary. The other is by naming the Winona Health Foundation as the owner and beneficiary of a paid-up policy.

- **Retirement Plan Assets**

Much like life insurance, you can name the Winona Health Foundation as a beneficiary of your retirement plan. Gifting your retirement plan keeps this appreciated, taxable asset out of your estate and can create opportunities to maximize what eventually reaches your heirs.

- **Real Estate**

If you own property that has appreciated in value and is lien free, you may choose to gift it outright to the Winona Health Foundation. It is also possible for you to gift your residence, farm or vacation home to the Winona Health Foundation while reserving the right to use the property for your lifetime and that of your spouse.

- **Tributes**

When a friend, colleague or family member celebrates a birthday, achieves a milestone, or is experiencing an illness or death, you may find yourself searching for an appropriate way to acknowledge them. A gift to the Winona Health Foundation in honor or in memory of someone is a meaningful way to pay tribute to that person and the things they hold dear.

- **Engraved Pavers**

An engraved paver is a unique way to remember or honor someone. Your inscription will be carved on a granite paver and set into the paths in the Robinson Healing Garden, serving as a lasting tribute to someone special in your life.



## Recognizing our Benefactors

We have two distinct programs to recognize and acknowledge benefactors.

- **Circle of Visionaries**

It takes great vision to invest in an organization’s future beyond one’s lifetime. Through thoughtful planning and a belief in the mission of Winona Health, members of the Circle of Visionaries have shared with us their intent to leave a gift to the Foundation at the time of their passing.

Joining the Circle of Visionaries is as easy as informing the Winona Health Foundation of your plans.

- **Cumulative Giving Program**

Legendary Philanthropists – \$500,000+  
Benevolent Humanitarians – \$250,000-\$499,999  
Distinguished Benefactors – \$100,000-\$249,999  
Devoted Advocates – \$50,000-\$99,999  
Inspired Leaders – \$25,000-\$49,999  
Caring Partners – \$10,000-\$24,999

*“Only by giving are you able  
to receive more than you  
already have.”*

— Jim Rohn

## Gifts Requiring Assistance

Gift opportunities that require the assistance of a professional advisor or prior consultation with the Winona Health Foundation include:

- Charitable Gift Annuities
- Charitable Remainder Trusts
- Charitable Lead Trusts

## We Make Giving Easy

Making a contribution can be as easy as using your credit card online at [winonahealth.org](http://winonahealth.org) or writing a check and mailing it to the Foundation.

Gifts may be made in support of the broader Winona Health mission or designated for a specific purpose.

To learn more about how you can make a difference through giving to the Winona Health Foundation, please call us at 507.457.4394, email us at [foundation@winonahealth.org](mailto:foundation@winonahealth.org) or scan the QR code below.

