

## Beneficiary Designation

### Gift of Life Insurance or Retirement Plan

One giving option is to name McLaren Bay Medical Foundation as a beneficiary of one of your assets, such as your retirement plan or life insurance policy. This is a popular way to give because you can set it up by yourself. Your current budget isn't affected because the gift is completed after your lifetime and you can change your mind at any time. A retirement plan or life insurance policy legacy gift can have a huge impact on the patients and families served by McLaren Bay Medical Foundation.

### The steps are simple:

- Contact your retirement plan administrator or life insurance company and request a change-of-beneficiary form or, download a form online.
- Decide what percentage of the account you wish to give and name McLaren Bay Medical Foundation, along with the percentage, on the form.
- Sign and return the form to your plan administrator or insurance company.
- Tell us about your gift! We would be honored to welcome you as a member or of our Legacy Society.

### Benefits of designating McLaren Bay Medical Foundation:

- Leave a lasting legacy that will be remembered.
- Lessen the burden of taxes on your family.
- May receive estate tax savings.
- Flexibility to modify your beneficiary designation any time until your death should your needs change.

*Be sure to ask your financial advisor if this is a practical option for you.*



### To explore your giving options contact:

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