



Your Personal Estate Planning Toolkit

Leave a piece of your legacy to provide care and hope to patients in need.

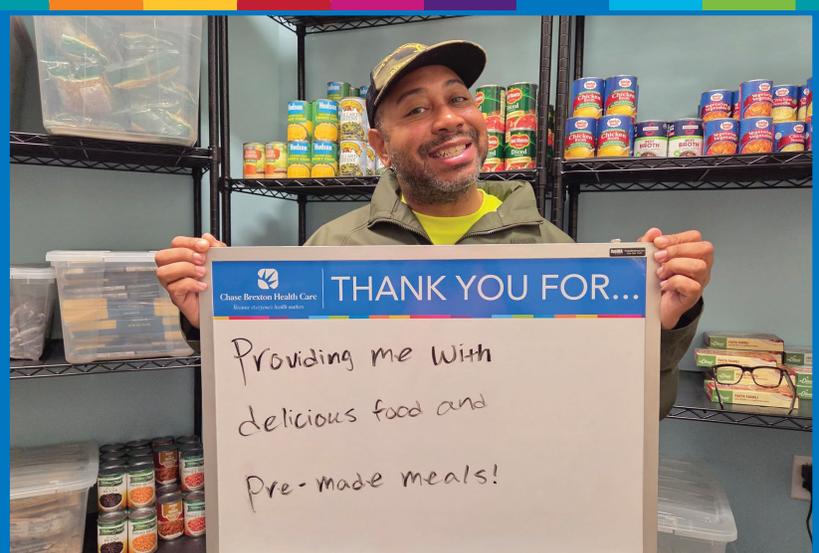
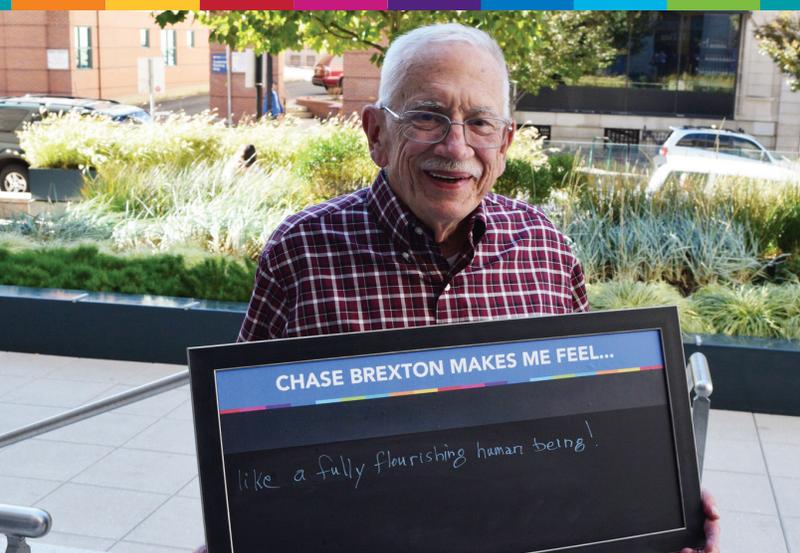


Table of CONTENTS

01 Use Your Gift to Impact Your Community

- Common Bequests (with Sample Language)
- Bequest Designations

02 More Ways to Make a Difference (Beyond Your Will)

- Life Insurance
- Retirement Funds
- Appreciated Securities
- Charitable Lead Trust
- Donor Advised Fund

03 Three Simple Steps to a Strong Estate Plan

- Beneficiary Designations
- Estate Inventory
- Consulting an Estate Planning Professional

04 Your Estate Planning Checklist

- Last Will & Testament
- Living Trusts
- Beneficiary Designations
- Charitable Intentions
- Healthcare Documents
- Financial Power of Attorney (POA)
- Insurance & Financial Information
- Proof of Identity Documents
- Titles & Property Deeds
- Digital Accounts
- End-of-Life Instructions

Elisabeth & Jayne's Story

"Chase Brexton bends over backwards to get you what you need. You can't get that care anywhere else."
– Elisabeth & Jayne, Chase Brexton Health Care Patients

Hear Elisabeth and Jayne as they share their experience with Chase Brexton Health Care during their crisis and beyond.



[Elisabeth & Jayne's Story >](#)

 Chase Brexton Health Care

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Chase Brexton Tax ID No. 52-1638592

Chase Brexton Health Care’s mission is to provide compassionate, high-quality, and integrated health care that respects the unique needs of each patient and advances wellness in the communities we serve—but we cannot carry out this mission without you.

With the support of Chase Brexton donors, we can bolster state-of-the-art, patient-centered care to answer our community’s call for health access. Through planned giving to Chase Brexton Health Care, you can leave a lasting legacy in your name and help us deliver our mission to those who need it most.

This toolkit is designed to walk you through everything you need to start your legacy planning, such as how to include Chase Brexton as a beneficiary, the three steps for keeping your estate plans strong over time, and other ways to make a meaningful gift.

Leave a Lasting Legacy—According to Your Wishes

Including a gift in your will or trust is easy, and the chart below guides you in selecting the type of bequest that best fits your wishes, as well as providing sample language to add a short statement to your will or trust.

Naming **Chase Brexton Health Care** is one of the most impactful ways to support care for our community. You can update your beneficiaries at any time by revising your will or trust.

Common Bequests (with Sample Language)

BEQUEST TYPE	DESCRIPTION	SAMPLE LANGUAGE
General Bequest	A specific dollar amount.	"I bequeath the sum of [dollar amount] to Chase Brexton Health Care as an unrestricted gift to fulfill the mission."
Residual Bequest	The remainder of your estate after other gifts and debts.	"The residue of my estate, after the settlement of all debts and other bequests, I give to Chase Brexton Health Care as an unrestricted gift to fulfill the mission."
Percentage Bequest	A percentage of your estate.	"I give [percentage amount] % of the total value of my estate to Chase Brexton Health Care as an unrestricted gift to fulfill the mission."
Contingent Bequest	A gift made if a named beneficiary predeceases you.	"I give the bequest of [dollar amount] to [name of beneficiary]. However, if [name of beneficiary] does not survive me, I designate Chase Brexton Health Care as the devisee of this bequest, to use the unrestricted gift to fulfill the mission."

Your Gift, Your Choice: Designate Your Bequest.

Your estate plan reflects your life, your priorities, and the impact you wish to have on the future. A legacy gift, also known as a planned gift, extends your values beyond your lifetime and supports the community that matters to you.

When planning your gift, you can choose how it will be used:

- **Unrestricted Use:** Allow your gift to be applied where it’s needed most.
- **Restricted Use:** Direct your gift to a specific program, clinic, or initiative.
- **Tribute Gifts:** Honor or remember someone special with your legacy.
- **Endowed Gifts:** For transformational planned gifts, create a permanent fund whose annual earnings support Chase Brexton Health Care in perpetuity.



Your donation can go to one of our programs such as The Power Project. The Power Project is a group of highly compassionate, sex-positive HIV experts who focus on testing and prevention. As a part of the Chase Brexton Social Work and Outreach, their mission is to help bring an end to the HIV epidemic.

These options can be practical, tax-efficient ways to include Chase Brexton Health Care in your legacy.

Life Insurance

Make a lasting gift through a policy you already own.

How it works: Name Chase Brexton Health Care as the primary or contingent beneficiary of a new or existing policy.

Benefits:

- Make a significant future gift without affecting current income or savings.
- Proceeds go directly to Chase Brexton Health Care, avoiding probate.
- May reduce estate taxes depending on how the policy is structured.

Retirement Funds (IRAs, 401(k)s, 403(b)s)

A way to give from tax-deferred accounts.

How it works: Designate Chase Brexton Health Care as a beneficiary on your retirement account.

Benefits:

- Retirement assets left to individuals are often taxable; charities receive them tax-free.
- Your election can reduce income and estate taxes for other beneficiaries.
- Simple to set up and change as needed.

Appreciated Securities

Contribute stock held over one year instead of cash for additional tax savings.

How it works: Transfer publicly traded stock held for more than one year directly to Chase Brexton Health Care.

Benefits:

- No capital gains tax on the appreciated value.
- Potential income tax deduction based on fair market value (subject to IRS limits).
- Often enables a larger gift without increasing out-of-pocket cost.

Charitable Lead Trust (CLT)

Support Chase Brexton during your lifetime while preserving assets for your family.

How it works: Place assets in a trust that makes annual payments to Chase Brexton Health Care for a set term; remaining assets pass to your beneficiaries afterward.

Benefits:

- Provides dependable support to Chase Brexton during the trust term.
- May reduce estate and gift taxes.
- Preserves family control of principal after the term ends.

Donor-Advised Fund (DAF)

A simple, flexible way to manage your charitable giving.

How it works: Make a contribution to your DAF, receive an immediate tax deduction, and then recommend grants to your favorite nonprofits—like Chase Brexton Health Care—over time.

Benefits:

- Maximizes your tax benefits.
- Streamlines your giving.
- Support causes you care about when it matters most.

We're Here to Help

Details of planned giving involve specific legal and tax considerations. Please consult your financial and tax advisors. Our team can coordinate with you and your advisors to craft a plan that reflects your goals.

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Chase Brexton Tax ID No. 52-1638592

03 Three Simple Steps to a Strong Estate Plan

A well-prepared estate plan ensures your wishes are honored and your legacy lives on. These three steps make the process easier and more organized:

1. Add, Review, or Update Beneficiary Designations

Beneficiary designations specify who will receive certain assets, such as retirement accounts, life insurance, or payable-on-death accounts, after your passing. These designations override instructions in your will or trust, which only govern assets without named beneficiaries. Keeping them up to date ensures your estate plan reflects your current wishes and avoids unintended outcomes.

Tip 1: Review your beneficiary designations regularly—especially after major life events like marriage, divorce, or the birth of a child—to keep them aligned with your wishes.

Tip 2: Consider listing beneficiaries as an amendment to your will or trust. This approach makes updates easier and avoids the need to rewrite your entire estate plan when circumstances change.

2. Create an Estate Inventory

An estate inventory is not legally binding, but it is an invaluable organizational tool. It helps you prepare for meetings with your attorney and trusted family member or friend and simplifies administration later. A simple spreadsheet works well for tracking everything you own and owe.

What To Include

Assets (What You Own):

- Real estate
- Financial accounts
- Investments
- Life insurance
- Online accounts
- Business interests
- Retirement accounts
- Personal property
- Vehicles

Liabilities (What You Owe):

- Debt
- Loans
- Mortgages
- Court judgements

3. Consult an Estate Planning Professional

Working with an experienced attorney ensures your documents are accurate and state-specific, which is essential for ensuring your affairs are handled according to your wishes. They'll guide you through essential legal documents, including:

- Last will and testament and/or trust
- Power of attorney for health care
- Power of attorney for finances
- Living will/advance directive



Tip: Use a free, digital legal resource such as eForms.com, peoples-law.org, or marylandcomptroller.gov for various estate plan document templates.

Additional Resources:



Maryland Personal Financial Power of Attorney Form
The Maryland People's Law Library



Maryland Form 548 Power of Attorney
Comptroller of Maryland

This checklist is for personal planning purposes only and does not replace professional legal or financial advice. Please consult an attorney or financial advisor for guidance.

It is recommended that you work with a Maryland attorney if available. FreeState Justice, Maryland Volunteer Lawyers Service, Maryland Legal Aid, and Civil Justice all provide free or low-cost estate planning services.

Please use this checklist as a guide to confirm that your assets are in order and that your bequests are honored and respected.

1. Last Will & Testament

Do you have a current will? Yes Date of last update: _____

Location of original will: _____

Executor's name and contact information: _____

Attorney's name and contact information, if applicable: _____

2. Living Trusts

Do you have a living trust? Yes Date of last update: _____

Date of last update: _____

Location of trust documents: _____

Trustee(s):

Name: _____

Relationship: _____ Contact Phone: _____

Contact Email: _____

Name: _____

Relationship: _____ Contact Phone: _____

Contact Email: _____

Successor Trustee(s):

Name: _____

Relationship: _____ Contact Phone: _____

Contact Email: _____

Attorney's contact information, if applicable: _____

Name: _____

Relationship: _____ Contact Phone: _____

Contact Email: _____

Attorney's contact information, if applicable: _____

3. Beneficiary Designations

- Updated retirement accounts (401k, IRA, etc.)
- Updated life insurance beneficiaries
- Updated bank account "Payable on Death" designations

Other assets with beneficiary designations: _____

Date last reviewed: _____



Tip 1: Beneficiary designations override your will—review them regularly and after major life events.

Tip 2: Consider listing beneficiaries as an amendment to your will or trust. This approach makes updates easier and avoids the need to rewrite your entire estate plan when circumstances change.

4. Charitable Intentions

List of each organization, foundation, or cause you wish to support:

Name of Organization: _____

Address/Contact Information: _____

Tax ID (often referred to as the EIN): _____

Contact person for organization: _____

Check all that apply:

- | | |
|---|--|
| <input type="checkbox"/> Specific cash amount | <input type="checkbox"/> Life insurance proceeds |
| <input type="checkbox"/> Percentage of estate or trust assets | <input type="checkbox"/> Retirement account beneficiary designation |
| <input type="checkbox"/> Real estate | <input type="checkbox"/> Donor-Advised Fund contributions |
| <input type="checkbox"/> Securities or investment accounts | <input type="checkbox"/> Charitable remainder trust or charitable lead trust |

Other (please specify): _____

Would you like to designate your gift? Yes Bequest designation, if applicable: _____

Would you like public recognition of your gift?

Yes, please recognize me/my family as follows: _____

No, I prefer to remain anonymous.

Additional instructions: _____

5. Healthcare Documents

- Living will & advanced directive
- Completed HIPAA authorization forms
- Healthcare power of attorney:

Agent Name: _____ Contact Information: _____

Alternate agent(s):

Agent Name: _____ Contact Information: _____

Location of signed documents: _____ Date executed: _____

6. Financial Power of Attorney (POA) Completed financial POA:

Agent Name: _____ Contact Information: _____

 Alternate agent(s):

Agent Name: _____ Contact Information: _____

Location of signed documents: _____ Date executed: _____

7. Insurance & Financial Information Updated life insurance policies Long-term care insurance (if applicable) Health insurance Bank accounts and investment accounts Disability insurance (if applicable) Retirement accounts Policy numbers and company contact information: _____ Location of documents (physical and digital): _____**8. Proof of Identity Documents** Birth certificate Marriage/divorce certificates Social Security card Military records (if applicable) Passport/driver's license**9. Titles & Property Deeds** Real estate titles: _____ Vehicle titles: _____ Business ownership papers (if applicable): _____**10. Digital Accounts** Updated password master list Online banking/bill-pay information Email, social media, cloud accounts Instructions for digital assets (photos, videos, audio files, etc.)

Tip: Consider using a password manager and designating a digital executor. Include instructions for closing or memorializing social accounts.

11. End-of-Life Instructions Funeral or memorial wishes Burial or cremation preferences Obituary or message prepared Prepaid funeral arrangements and contact person: _____ Other: _____

Security Note: Store originals in a fireproof, waterproof safe or with your attorney. Share access only with trusted individuals. Ensure digital backups are encrypted.

Your Gift, Your Legacy

Every planned gift makes a meaningful difference for those in need.

By including Chase Brexton Health Care in your estate plans, you help sustain accessible, compassionate health care for years to come.

For more information or to discuss your plans confidentially, please contact:

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