

PINNACLE PERSPECTIVES

SMART, TAX-WISE GIVING NEWS FOR SOPHISTICATED DONORS

D-H EMPLOYEES INSPIRE DONORS' GIVING



The Conatys felt it was the right time to make a gift commitment.

Bill and Sue Conatys's gift commitment in support of Dartmouth-Hitchcock Medical Center's (DHMC) new Patient Pavilion is striking in its generosity: \$5.25 million, the second-largest donation in Dartmouth-Hitchcock (D-H) history, a component of which will come in the form of a bequest. The inspiration behind it is remarkable as well: The Conatys made their gift in honor of all Dartmouth-Hitchcock Health (D-HH) employees.

"It felt natural for us to say this is in honor of the hardworking folks of this organization," says Bill, who served on the D-H Board of Trustees from 2011 until 2020. "I've never met a more dedicated and appreciative group of people."

The Pavilion, set to open in 2023, will provide 64 single-occupancy rooms and include unfinished space to allow for future expansion. As a board member, Bill understood the urgent need for this facility.

"In nine years of meetings I kept hearing about the hundreds of people DHMC was forced to turn away because we didn't have the capacity to care for them. It felt wrong," he says, "so Sue and I asked, 'What can we do?'"

This isn't the first time the Conatys posed that question. At the beginning of the COVID-19 pandemic, Bill and Sue made a generous donation to D-H's Personal Protective Equipment (PPE) Fund. Five years earlier, they addressed the challenge of rural workforce recruitment and retention by launching the Conaty Institute for Transformational Health Care Leadership at D-H.

"There's no shortage of technical expertise already in this organization," Bill says. "This initiative offers executive leadership courses to develop D-H's future leaders from within."

The Conatys are committed to continuing their support of workforce development at D-H and they see the Pavilion as part of that. "I want D-H to be the employer of choice in New Hampshire, not only promoting from within but also attracting the best medical students and top docs," says Bill. "Now, while other institutions are cutting back, D-H is expanding. It sets us apart."

That's why this felt to the Conatys like the right time to make their extraordinary gift commitment. "We're at a time in our life when we have to ask, besides taking care of our family, where do we want our money to go?" Bill says. "Sue and I decided we could do more for D-H. And we hope it kick-starts that thinking in others."

In this way, the Conatys are like the D-H employees they've honored: giving of themselves, and inspiring others to do the same.

INTRODUCING EASY ESTATE PLANNING

with FreeWill on the New Planned Giving Website

- FreeWill is web-based software that makes estate planning as easy to accomplish as it's been to avoid, and you can now access all its features through the new planned giving website for Dartmouth-Hitchcock (D-H) and Geisel School of Medicine.

FreeWill offers simple online tools that anyone can use to create estate-planning documents—at no cost. All estate plans made using FreeWill are 100% legal and customized to the user's state of residence.

Recognizing the human instinct to do good, FreeWill helps users tailor a variety of planned gifts to care for the people and the causes most important to them.

By accessing FreeWill through the new planned giving website, you can do a number of things, including:

- Write or update a will**—When you don't have a will, your wishes are unknown and your state names a representative to distribute your assets. FreeWill provides an intuitive and efficient way of creating and updating wills. You'll be asked a number of simple questions about yourself, your wishes, and your beneficiaries. **This is an ideal way to support a program that's important to you, such as Geisel student scholarships.** After answering the questions, you'll be able to print a PDF of your will along with instructions on how to sign and witness the document, and make it official.



FreeWill offers simple online tools that anyone can use.

- Transfer Individual Retirement Account (IRA) distributions**—Qualified charitable distributions from IRAs satisfy annual required minimum distributions (RMDs). FreeWill can help you easily calculate your RMDs and **prepare IRA gifts to support causes like the new Patient Pavilion at Dartmouth Hitchcock Medical Center** in just a few minutes.
- Make a gift with a donor-advised fund (DAF)**—Whether you already have a DAF or want to start one, FreeWill can help you find the information you need. DAFs allow you to have immediate impact by giving you online tools to suggest a grant to Geisel or D-H now, or to use your fund for future charitable gifts. Along with wills and IRA transfers, **the DAF is a simple method to provide for your medical school reunion credit.**

With FreeWill, estate planning has never been easier. To get started today, visit [DHGeiselplannedgiving.org](#).

A GIFT IN YOUR WILL

A gift in your will that supports the work of Dartmouth-Hitchcock Health and/or Geisel School of Medicine at Dartmouth should be directed to:

One Medical Center Drive, Lebanon, NH 03756

Tax ID# 26-4812335 (for D-H) and
Tax ID# 02-0222111 (for Geisel).

Sample language:

"I hereby, give, devise, and bequeath to _____
One Medical Center Drive, Lebanon NH 03756,
tax ID # _____ the following sum [state
the amount of the gift or asset(s)], or _____
percent (____%) of my residuary estate,
whichever is less, to this purpose: _____."



IN THE NEWS

Three new gifts, totaling \$3.35 million, will advance cancer immunotherapy research and teaching at Dartmouth's and Dartmouth-Hitchcock's Norris Cotton Cancer Center. These gifts will help accelerate the development of multiple, promising, next-generation immunotherapies, which harness a patient's own immune system to fight cancer.

During the pandemic, Geisel students led essential health situation planning conversations with nursing home residents and their families thanks to a gift from Charles Hamlin MED'65. The Charles Hamlin, MD, Endowment at Dartmouth-Hitchcock supports programs focused on promoting and improving advance care planning.

D-HH and Colby-Sawyer College expanded their longstanding partnership to support critical workforce pipelines across the D-HH system and elevate learning and career opportunities for Colby-Sawyer students. New academic programs focus on medical laboratory science, social work, addiction studies, and health care administration.

Northern New Englanders living with long-term symptoms of COVID-19 can now receive expert care at DHMC's post-COVID-19 program. The program provides access to a comprehensive medical team specializing in the various health problems often seen in long-haul patients.

For more information about tax-wise giving, please contact Judi Taylor Cantor, Director of Planned Giving, Judi.T.Cantor@Hitchcock.org or Judi.T.Cantor@Dartmouth.edu, or phone or text her at (617) 407-9390. You can also visit **DHGeiselplannedgiving.org**. All inquiries are confidential.



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INSIDE THIS ISSUE: A TESTAMENT TO HIS COMMITMENT TO HIS DAUGHTER | THE ORIGIN OF THE NAME "PINNACLE SOCIETY"

Dartmouth-Hitchcock



Dartmouth
GEISEL SCHOOL OF
MEDICINE

Contact us at (617) 407-9390 to get started.