

Join Us *in Growing a Culture of Local Philanthropy...*

HEALTH CARE
FOUNDATION
FOR VENTURA COUNTY



Retirement Planning in 2024



Overview

1. Retirement Planning Advice/ Checklist

- Secure peace of mind for your family by starting or updating your will & trust.

2. Our Free Thank You Gift to You

- Free will, trust, and planned giving resources – valued at \$2,000!

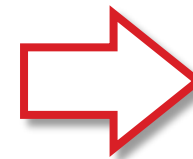
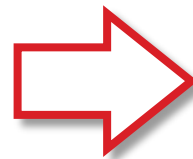
3. An Engagement Opportunity

- A chance for Ventura County retirees to contribute to HCFVC, continuing to invest back into VCHCA and our local healthcare system.



Health Care Foundation for Ventura County (HCFVC)

Is dedicated to enhancing the capacity of Ventura County Health Care Agency's (VCHCA) ability to provide *quality, cost-effective, and compassionate* health care for all.



- ✓ **100% Tax Deductible**
- ✓ **Unrestricted Giving**

- ❑ **Programs:** Provides funding to enhance VCHCA departments and services.
- ❑ **Education:** Summer Scholar Program & Health Occupations Pipeline Education.
- ❑ **Medical Equipment:** Purchases essential point-of-care medical equipment to improve patient outcomes.

Retirement Planning Checklist:

❑ Consider donating up to 40 unused vacation hours to HCFVC

- Log in to your **VCHRP portal** to review your vacation hour balance and ensure you're within the accrual limit.
- To donate up to 40 hours, simply **email ac.payroll@ventura.org** with your employee ID# and the number of hours you wish to donate.

❑ Be sure to consult with your CPA to determine your tax bracket and understand the implications

- Donating a portion of your vacation hours could potentially **lower your tax bill**.

❑ Complete your **WeGive Retiree donation form**

- The opportunity to philanthropically donate does **not end at retirement!**
- Donations can be charitably given through your **monthly pension check**.

❑ **Secure and complete your free will & trust through HCFVC and Giving Docs today**

- Don't delay this **necessary task** any longer!
- Ensure peace of mind and **security for your family's future**.



**Our Gift to
You!
A \$2,000
Value!**



- As a Ventura County employee, you are the backbone of our community.
- To show our appreciation, HCFVC is offering a free will & trust for you, your friends and your family!
- Explore a variety of planned giving options available, including bequests, charitable gift annuities, and 401 (k) designations.
- You have the option to include HCFVC in your estate plan.

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Scan Here!
or Visit

givingdocs.com/hcfvc

Full Suite of Estate Planning Tools Legally Binding in All 50 States



Will/ Trust



Codicil



Beneficiary
Designation
Assistance



Durable
Power of
Attorney



Advance
Healthcare
Directive



Qualified
Charitable
Distribution Tool



Donor Advised
Fund Tool

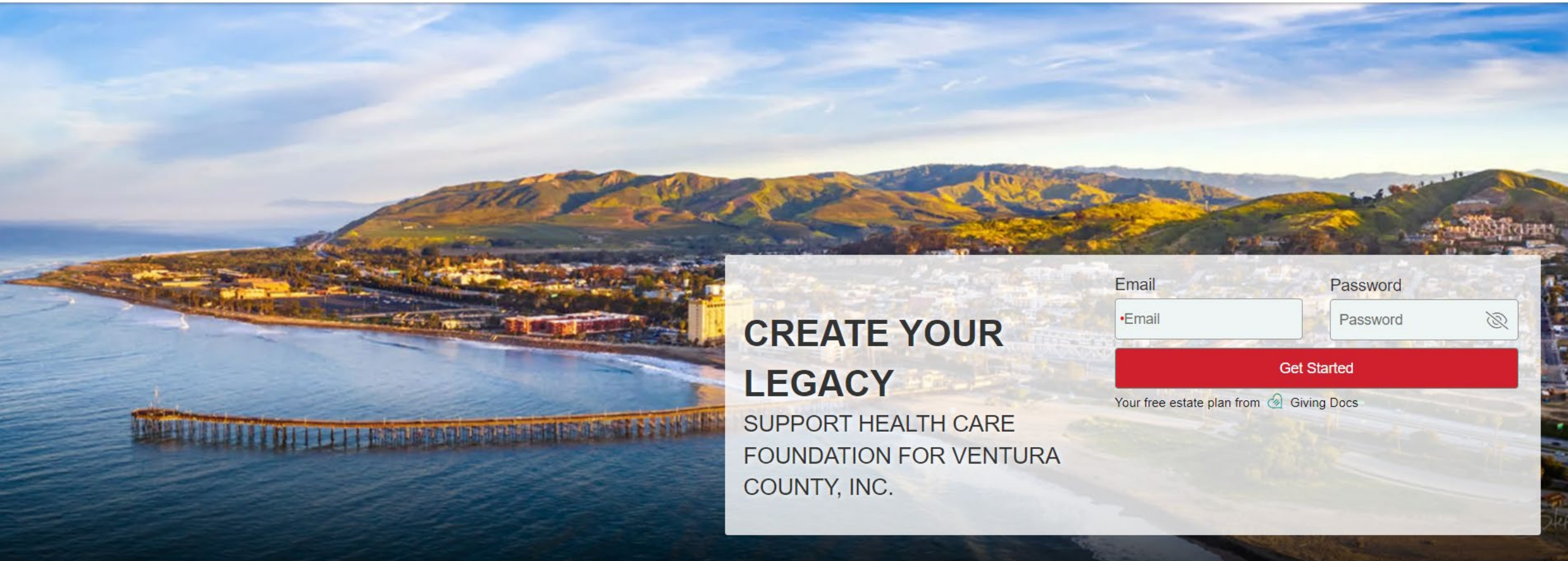


Stock Gift
Tool



IN PARTNERSHIP WITH Giving Docs

User Login



CREATE YOUR LEGACY

SUPPORT HEALTH CARE FOUNDATION FOR VENTURA COUNTY, INC.

Email

Password

Get Started

Your free estate plan from Giving Docs

Join other Health Care Foundation for Ventura County, Inc. supporters and plan your legacy. **Giving Docs is safe, secure and free for life.**

Health Care Philanthropy Doesn't End at Retirement!

It's Just the Beginning!



- ❑ The **WeGive Retirees Giving Initiative** offers retired Ventura County employees a unique opportunity to invest back into our local health and hospital system.
- ❑ Continue your **spirit of giving** after retirement!
- ❑ **Reduce the potential tax impact** of mandatory IRA distributions, which begin at age 72.

Key Action Items

- ❑ Complete your **free will & trust** at givingdocs.com/hcfvc and leave a planned gift to HCFVC.
- ❑ Become a **WeGive Retiree** by continuing your philanthropic spirit in retirement and reduce the potential tax burden of mandatory IRA distributions.
- ❑ Visit HCFVC.org and explore the “Planned Giving” tab to discover how you can leave a **strategic planned gift** to HCFVC.

Additional Ways to Create a Lasting Legacy of Giving

- ❑ Donate an **engraved brick** to the VCMC Healing Garden.
- ❑ Donate **stocks** or give through a “**Donor Advised Fund**” to HCFVC.
- ❑ Go to HCFVC.org and download our **free estate planning guide**.

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Questions?

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INVEST LOCAL & **GET SOCIAL**



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