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Planned Giving

Make a difference in the lives of the patients of St. Mary's Healthcare System for Children through planned giving of life insurance, real estate, stocks and more.

Leave behind a legacy of philanthropy when you include St. Mary's Healthcare System for Children in your gift planning.

Whether it's through a life insurance policy, real estate, a bequest, a charitable remainder trust, or transfer of stocks and securities, you can be confident that your tax-advantaged gift will be used to help treat and heal children and young adults with medically complex conditions—and that your generous spirit and big heart will live on through the lives of the little patients you've changed.



Bequests

You may give your gift as a bequest—via a will or living trust—to St. Mary's Foundation for Children, which will reduce estate taxes and provide invaluable support to our tiny patients.



Life Insurance

If you currently have a life insurance policy but no longer have need of it, you can name St. Mary's Foundation for Children as the beneficiary. Immediately following this adjustment, you can claim a charitable deduction for an amount equal to the fair market value of the policy or your income tax basis in the policy, whichever is less. Or, you may purchase a new insurance policy naming St. Mary's Foundation for Children as the owner and beneficiary, of which the annual premium payments will also be also tax-deductible.



Real Estate

If home is where your big heart is, you have the opportunity to fund your contribution to St. Mary's with the gift of real estate. You can either give the property directly to St. Mary's Foundation for Children, or, if you actively reside on the property, gift the property with a retained "life estate." This will enable you to take advantage of the immediate tax benefits of a charitable gift while you continue to maintain your residence.



Charitable Remainder Trusts

Through the creation of a charitable remainder trust (CRT) funded by cash or securities, you can meet your financial needs and provide generous support for St. Mary's. While benefits differ depending on trust type, funding method and your age at origination, it will help you reduce or avoid capital gains taxes on appreciated securities. Speak to your financial planner and attorney for more information.

For more information on the above gift planning options, contact Sean Lally, Development and External Relations, at slally@stmaryskids.org, or at 718-281-8714.

Transfer of Stocks and Securities

Would you like to make a donation in the form of stocks or securities? The electronic delivery of stock shares is the most secure and expedient delivery process available. Share the information below with your broker to complete the process.

Institution: HSBC Bank USA

Contact: Bari Simensky
Phone: 212-525-8421
Email: Bari.Simensky@us.hsbc.com

The donor or the transferring broker must provide St. Mary's Healthcare System for Children with the following information for audit and acknowledgment purposes:

- Donor's name and complete address
- Name and number of securities transferred
- Approximate dollar value of gift

You or your broker may fax a letter or send an email to communicate this information at the time of transfer to:

St. Mary's Foundation for Children
Fax: 718-423-6001
Email: abasket@stmaryskids.org

Instructions to Transfer Securities to St. Mary's Foundation for Children

DTC ELIGIBLE SECURITIES
HSBC Bank USA
DTC Participant #0987
Account # 9999B; St. Mary's Foundation for Children
HSBC Institution & ID Agent Number 20918
Contact: Bari Simensky
Phone: 212-525-8421
Email: Bari.Simensky@us.hsbc.com

For more information on the transfer of stocks and securities, contact Sean Lally at slally@stmaryskids.org, or Angela Basket at abasket@stmaryskids.org, or call 718-281-8890.

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St. Mary's Hospital for Children
29-01 216th Street
Bayside, NY 11360
Telephone: (718) 281-8800

St. Mary's Preschool
Queens Borough President Helen Marshall
Early Education Center
Telephone: (718) 281-8848

Center for Pediatric Feeding Disorders
Telephone: (718) 281-8541

St. Mary's Kids at Roslyn
1 Expressway Plaza, Suite 106
Roslyn Heights, NY 11577
Telephone: (516) 621-2681

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Hospital Resources

Access the resources and information you need to be a strong advocate for a child with a complex medical condition.

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