Though Charlene Werling retired from nursing several years ago, she still misses the community she formed from her days at Jewish Hospital School of Nursing, where she made lifelong friends as she studied the art and science of compassionate nursing.

“I always wanted to be a nurse,” Charlene says. “I got accepted to Jewish Hospital School of Nursing, and it was meant to be. I made so many good friends.”

In fact, her husband, Dale, noticed the strong bond between classmates who went on to be roommates, travel buddies, volunteer partners and more.

“It was a wonderful experience for me to see how close they were to each other,” he says.

One friend in particular, Linda Stamm, made an impact that Charlene and Dale are honoring through a gift in their estate plan to benefit a scholarship at Barnes-Jewish College’s Goldfarb School of Nursing.

“She was a very good friend and mentor, and she was always there for you,” Charlene says. “This scholarship is such a tribute to her. Nursing was her life, and I’d like to see her legacy carried on.”

At the same time, the couple hopes to pay it forward so more students can study nursing—and enjoy the rewarding sense of community Charlene experienced—without the financial burden.

“There are people who have the desire, the compassion and the ability to become a nurse, but not the resources,” Charlene says. “My husband and I did not have children to put through college, so we felt making a gift in our will to benefit a nursing scholarship was a good way to invest in the future of nursing, while honoring a good friend’s memory.”

Charlene and Dale Werling are honoring a friend and mentor through a scholarship at the Goldfarb School of Nursing.

Celebrate Your Bond
Like the Werlings, you can recognize the impact an individual has had on your life by making a gift to The Foundation for Barnes-Jewish Hospital in their honor. Contact Joan Cheaney at 314-286-0704 or joan.cheaney@bjc.org to learn more.
If you have a friend or family member whose life has been touched by Barnes-Jewish Hospital or our partners, consider making a tribute gift to us in his or her name. When you memorialize some of the most important people in your life, such as your mother, father, spouse, mentors or other special loved ones, as part of a gift to the Foundation, you:

• honor that special person;
• support our exceptional care; and
• possibly receive personal financial benefits.

You Have Choices
Three basic methods are available for establishing a tribute gift:

A gift today—An outright gift can help fund our immediate needs or an upcoming project. The financial benefits include an income tax deduction and the possible elimination of capital gains tax.

A gift through your estate plan—You can include a gift in your will or living trust, stating that a specific asset, certain dollar amount or percentage of your estate will pass to us at your death in honor of your loved one.

A gift that lives on forever—Tribute endowments can be made now or through your estate plan. Endowments are structured so that a small portion of your gift, rather than the whole amount, is used each year to fund a particular purpose. To perpetuate the fund forever, the majority of the fund always remains intact and is invested for the future.

We’re Here to Help
Making a tribute gift is a wonderful way to acknowledge someone’s vision for the future. Contact Joan Cheaney at 314-286-0704 or joan.cheaney@bjc.org to learn more about ways to recognize your honoree.
A will isn’t just a list of who gets your stuff—it’s a reflection of your life. It reveals who and what mattered most to you.

Just as people are in different stages of life, they’re also in different stages of will planning. Which stage are you in? See which stage fits you, and what you need to know.

1. I don’t have a will. Do I really need one?
   **Definitely.** A will is the most important estate planning document an adult can have, no matter your age or income. If you have children or own property or possessions, you need a will. Don’t let the state in which you reside decide what happens when you’re gone. Having a will saves your loved ones time, money and heartache.

2. I’m ready to create my will.
   **Great!** You’ve taken the first step to creating a secure future. Work with an estate planning attorney to compile a list of your assets and who you want to receive them. Select an executor to implement your will after your passing, as well as name guardians for any children or dependents under your care.

3. I have a will but want to update it.
   **Good idea.** You can consult with your estate planning attorney about changing your will whenever you want. Some situations that could prompt an update:
   - New marriage
   - Birth of a child
   - Passing of a loved one
   - Self-sufficiency of grown children
   - Changes in tax law
   - A desire to make a gift to the Foundation

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**Your Will Can Further Our Mission**

We would love to talk with you about how a gift in your will can make a meaningful difference in the lives of others. Contact Joan Cheaney at 314-286-0704 or joan.cheaney@bjc.org to begin planning for the future.

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**Join the Legacy Circle**

Those who make commitments to the future of education, research and patient care with estate provisions or life income gifts through The Foundation for Barnes-Jewish Hospital are welcomed as members of the Foundation’s Legacy Circle. This planned giving recognition circle honors loyal friends whose gifts of future support help to ensure the continued excellence of Barnes-Jewish Hospital and its affiliated organizations. In addition, Legacy Circle members are recognized on the donor wall in Barnes-Jewish Hospital and in our annual Honor Roll publication.

If you have included the Foundation in your estate plan, thank you! We would like to acknowledge your gift in a thoughtful manner and welcome you into the Legacy Circle.

**To learn more** about the Legacy Circle, please fill out and return the enclosed envelope.
Benefit More From Your Giving

Think for a moment about everything you care deeply about: your family, your friends and organizations such as Barnes-Jewish Hospital. Now think about everything you own: bank accounts, real estate, stocks, retirement plans, life insurance, antiques and jewelry.

When you're gone, will the things you own go to the people and causes you love?

If you don’t have an estate plan, state law will decide how your property is distributed, and those you care about would wind up with only some—or none—of your assets.

An estate plan is like a guide for your family—a map of your passions that helps your loved ones know what to do in the weeks and months after you’re gone.

Your Next Steps
You don’t have to do it alone. (In fact, you shouldn’t.) An estate planning attorney will help ensure that your documents are in order and your family is cared for. You need someone who understands the laws in your state as well as federal law and someone who can help translate your wishes.

To Prepare for the Meeting:
1. Make a list of your major assets. This should include real estate, stocks, retirement plans, life insurance, bank accounts, certificates of deposit, art, antiques and jewelry.
2. Consider everyone you wish to benefit. If you are thinking about including a gift to The Foundation for Barnes Jewish-Hospital, we would be happy to help you. We can provide official legal wording for your will or discuss how your gift will help improve health care in our community. We would also love the opportunity to thank you for your gift and welcome you into our Legacy Circle.

Contact Joan Cheaney, Manager of Planned Giving

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314-286-0704  |  joan.cheaney@bjc.org

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THE FOUNDATION FOR BARNES JEWISH HOSPITAL

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