

The Gift of a Lifetime Legacy



Joan Weenig, R.N. and Dr. Clair Weenig, M.D.

Endow Your Values

At a professional gathering of colleagues and friends in May of 1995, Dr. Clair Weenig announced a collaborative gift from a grateful patient and two prominent John Muir Health physicians to establish the Douglas M. Lange, M.D., Clair S. Weenig, M.D., Walter and Eve Markstein Nursing Education Endowment Fund.

The purpose of the endowment is to support the quality of care that John Muir Health nursing staff provides to patients by financially supporting their educational quest to enhance the level of peri-operative care of the surgical patient.

With an initial investment of \$10,500, a commitment to make on-going gifts to the endowment, and the expert financial management of the endowment by the John Muir Health Investment & Finance Committee, the value of this endowment has grown to approximately \$120,000 and provides annual support for its stated purpose in excess of \$6,000 per year.

Over the years, many John Muir Health Operating Room personnel have received (and will continue to receive in perpetuity) financial assistance in their pursuit of additional education and training as a result of the vision and generosity of these individuals. Annual awards from the endowment are made in honor or memory of a surgeon or anesthesiologist recognized for having made a significant contribution to John Muir Health. Most recently, these awards were made in the name of Dr. Deborah Kerlin (2019) and Dr. Sheafe Ewing (2020).

As a further testimony of their values, Clair and his wife Joan, R.N., (pictured above and below), have made a commitment to add to this endowment through their estate plan.



Your Legacy

We invite you to continue the Legacy of Caring provided by John Muir Health by establishing your own Legacy of Giving through your charitable estate plans. We would be happy to help you explore gift options that meet your personal planning and philanthropic goals.

Welcome to Legacy!

Sharing our Vision and Values—Integrity

We often teach our children that integrity is “choosing to do the right thing, even when no one is watching.” One day I met with a donor who upon visiting her home showed me her beautiful garden in her front yard and then proceeded to show me her equally magnificent garden in her back yard. I asked her why she spent so much time making sure the two gardens matched in beauty. She told me that the front yard represented her reputation and the back yard represented her character and that the two must always match.

The integrity of John Muir Health, as an institution committed to its mission of improving the health of the community we serve with quality and compassion, shines brightly in the days of the COVID-19 pandemic. With pride we point to the many ways we continue to meet the challenges of the day with courage, character, compassion, creativity and commitment.

With pride we also point to the many ways that you have supported us throughout the years (especially 2020!) and we recognize that we could not do it without you and the amazing support you have provided. Because of you, we are able to match our reputation of providing world class health care with our character of serving the community with quality and compassion. We are so grateful!



Throughout the pages of this newsletter we hope to celebrate and share with you the spirit of integrity so present among our donor community, inspire you with stories of transformative acts of philanthropy that continue to make a difference in the lives of so many, and perhaps introduce you to some new ways of giving.

Michael G. Crvarich, CPA
Vice President, Legacy Giving



It is also with pride that I introduce you to my colleague, Mary Sherman, who was recently promoted to Program Manager within the Office of Legacy Giving. Mary has been with the Foundation for over seven years and has been a significant part of the growth and development of our values-based approach to philanthropy known as Legacy Planning.

—Congratulations, Mary!

Create Your Legacy Gift

Charitable estate planning can be financially beneficial for families and individuals of various ages and income levels. Find out what planning a Legacy Gift to John Muir Health can do for you and your loved ones—now and in the future.

Gifts John Muir Health Can Use Today



IRA Rollover Gifts (see back cover)
Donor Advised Funds
Appreciated Securities

Gifts That Can Pay You Income



Charitable Gift Annuity
Charitable Remainder Trust

Gifts That Take Effect After Your Lifetime



Bequest
Retained Life Estate
Charitable Beneficiary Designations
Retirement Plan
Life Insurance

For more information on how to create a Legacy Gift that is meaningful to you and your family, please contact the Office of Legacy Giving at (925) 941-2120 | Michael.Crvarich@givehealthjmh.org or Mary.Sherman@givehealthjmh.org.

Your Legacy Matters

Long Live Your Legacy!

John Muir Health Foundation Endowments—How Do They Work?

One of the attractive features of endowments is that they are designed to exist in perpetuity. Endowment gifts are invested and professionally managed, with the annual pay-out used to fund a program or area of interest of your choice. This means that the original gift amount is never depleted, but continues to grow over time and generate a steady, reliable source of income for the John Muir Health System. For this reason, many donors choose to name endowments to create a personal legacy and/or honor influential individuals.

Beginning with the first endowment gift in 1988, the Endowment Portfolio is currently comprised of 46 separate funds, with an approximate combined value of \$21.8 million. Currently, the minimum required gift amount to establish an endowment is \$50,000.

Over the last two years, the John Muir Health Foundation has received over \$3.5 million in endowment gifts.

Some of the endowment gifts we have recently received include:

1. Tomiko Brennman Endowed Fund For Nursing Education
2. Buhlman Family Endowment
3. Stephen Davenport Endowment
4. Andi Freeman Memorial Endowment For Melanoma
5. Silvio and Mary Garaventa Endowed Fund For Diabetes
6. Allan and Patti Jones Endowed Fund For Oncology and Pulmonary Rehabilitation
7. Edward and Lynn Little Endowed Fund For Pediatrics and Diabetes
8. Lange, Weenig, Markstein Nursing Education Endowment
9. G. Willard Miller Endowed Fund For Orthopedic Services
10. Support for JMH General Endowment by Jack E. and Linda A. Thompson
11. Robin Marie Welte Daniel Memorial Endowment



Endowments contribute to the high quality of care we provide, and offer a dependable, perpetual source of funding for the health system.

Endowment Investment Performance

as of December 31, 2020

Total Composite Investment Performance (Net of Fees)

	1 Year	5 Year	10 Year	Since 2002
Investment Return	17.1%	10.7%	9.1%	7.9%
Attribution Index*	15.3%	10.7%	9.0%	7.7%

*Attribution Index = 45% Russell 3000/20% MSCI ACWI ex USA/35% BBgBarc Global Aggregate TR

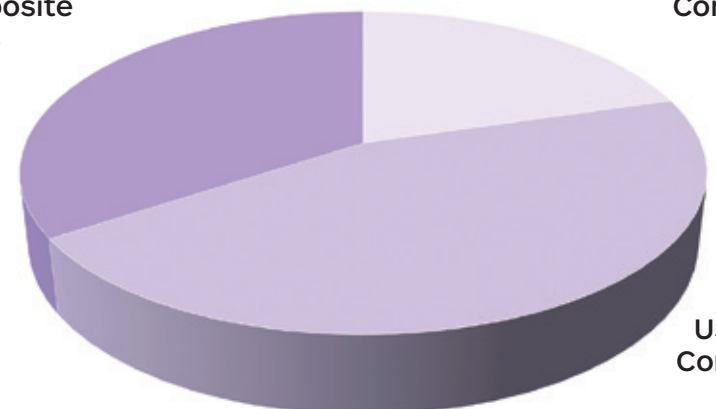
Asset Allocation

Total Endowment Value \$21,894,293

as of December 31, 2020

Fixed Income Composite
34.3%

Non-US Equity Composite
20.4%



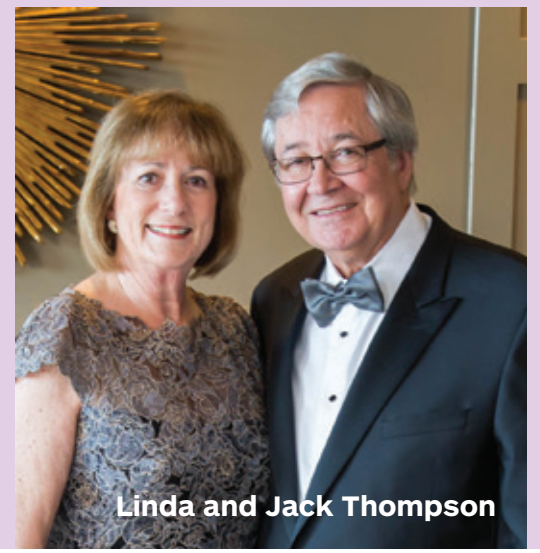
US Equity Composite
45.3%



The purpose of the John Muir Health Foundation's endowment program is to financially support the world-class mission of John Muir Health, and to help support it's financial sustainability for all future generations.

—Jack Thompson

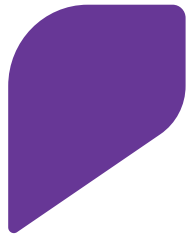
CHAIR, INVESTMENT SUBCOMMITTEE, JOHN MUIR HEALTH



Linda and Jack Thompson

Why Create An Endowment

1. Create an enduring legacy of support for John Muir Health that will continue to grow over time. (Think about the power of tax-free compounding over time.)
2. Endow your values and continue to impact the delivery of world-class health care for generations to come.
3. Honor a family member or health care provider that has been particularly meaningful to you.
4. Continue the pattern of annual giving to John Muir Health that you established during your lifetime.



How To Create An Endowment

1. Consider your long term charitable or estate planning goals.
2. Contemplate the impact you would like to make on the delivery of quality and compassionate health care for generations to come.
3. Endowments can be created through a minimum cumulative gift commitment of \$50,000, payable over a period of up to five years and currently have an annual pay-out rate of 5%.
4. Learn about the many options available to fund or add to an already established endowment during your lifetime or through your estate plan.
5. Think about how you would like to name your own endowment fund.
6. Call or contact us for more information or an illustration:

Office Of
**Legacy
Planning**

(925) 941-2120

Michael.Crvarich@givehealthjmh.org

Mary.Sherman@givehealthjmh.org

**A society grows great
when individuals
plant trees in whose
shade they know
they shall never sit.**

—GREEK PROVERB