



**The Children's Hospital  
of San Antonio™ Foundation**

**CHRISTUS Health**

100 Northeast Loop 410  
Suite 706  
San Antonio, TX 78216-4700

O 210.704.2800  
F 210.704.2384

[ChildrensHospitalSAFoundation.org](http://ChildrensHospitalSAFoundation.org)

## Advisor's Guide for Planned Giving

### **Gifts from Wills and Trusts:**

When making a charitable gift to a nonprofit organization, it is vital the legal name of the charity, city and other identifying details be used. To name The Children's Hospital of San Antonio Foundation in your will or trust please use the following suggested language:

#### **Unrestricted Bequest —**

"I give (a specific dollar amount/a specific asset, or percentage of the rest, residue, and remainder of my estate) to Santa Rosa Children's Hospital Foundation DBA The Children's Hospital of San Antonio Foundation, the charitable, tax-exempt organization located in San Antonio, TX, for its general purposes."

#### **Specific Bequest Language —**

"I give (a specific dollar amount/a specific asset, or percentage of the rest, residue, and remainder of my estate) to Santa Rosa Children's Hospital Foundation DBA The Children's Hospital of San Antonio Foundation, the charitable, tax-exempt organization located in San Antonio, TX, to be used for the following purpose: (state the purpose)."

NOTE: If you wish to restrict your bequest to a specific purpose or program at The Children's Hospital of San Antonio Foundation, please contact Ryan Ambrozaitis, CFRE, Director of Philanthropy at 210.704.3929 or Ryan.ambrozaitis@christushealth.org in advance to assure that the language you include will accomplish your wishes and align with The Children's Hospital Foundation's needs.

#### **Endowment funds for a restricted purpose -**

If your bequest will be used to establish an endowment fund for a restricted purpose, we recommend that you and your counsel consider adding a "saving clause" to your bequest provision. A "saving clause" is a way to ensure the usefulness and relevance of your bequest in the future as The Children's Hospital Foundation's needs and priorities change.

Proud Member Of:



For example: "If, in the future, it is the opinion of the Board of Trustees at The Children's Hospital of San Antonio Foundation that all or part of the income of this fund cannot be usefully applied to such purpose, it may be used for any related purpose which, in the sole opinion of the Board of Trustees, will most nearly accomplish my wishes."

Beneficiary Gifts from Retirement Plans, Life Insurance, Brokerage Accounts or any other plan with a beneficiary designation:

Please contact your plan provider for a change of beneficiary form. Once you have filled out the form, please send a copy to:

ChildrensFoundation@ChristusHealth.org  
(210) 704.3929  
100 NE Loop 410 Suite 706  
San Antonio, TX 78216

Legal Name: Santa Rosa Children's Hospital Foundation DBA The Children's Hospital of San Antonio Foundation

Tax I.D. Number: 74-1224362

Incorporated In: San Antonio, TX

Note to Attorneys, Accountants and other professional Advisors:

Thank you for helping your client with their charitable planning. If you have any questions or concerns, please contact Ryan Ambrozaitis, CFRE, Director of Philanthropy at 210.704.3929 or [Ryan.ambrozaitis@christushealth.org](mailto:Ryan.ambrozaitis@christushealth.org).