

Foundation News

A Quarterly Newsletter
of the Lee Memorial Health System Foundation

Funding Tomorrow's Healthcare Today

Saks Fifth Avenue and Mercedes Benz Help Turn the Key to the Cure



What happens when Saks Fifth Avenue and Mercedes Benz team up to benefit our community? Great things like Key to the Cure! This annual benefit, which includes shopping discounts, dining, makeovers, drawings and more, raises money for women with cancer. "This year was better than ever," said Carole Stockard, General Manager of Saks in Fort Myers and Chairwoman of the Lee

Cancer Care Advisory Board. "The kick-off event was also a time to recognize individuals whose devotion, commitment and dedication to quality, compassionate women's cancer care truly makes them deserving of the Humanitarian Award," added Stockard. This year's recipients are Cookie Needle, Dr. Peter Blitzer, Dr. Mary Kay Peterson and Dr. Bob Gerson (awarded posthumously) accepted by his wife, Nancy and daughter Debra Tanner. Two percent of sales during the event went to support Lee Cancer Care.



Carole Stockard, General Manager of Saks Fifth Avenue Fort Myers, welcomes supporters and shoppers to the kick-off event on September 17, 2003.

Rockin' in a Winter Wonderland



Mickey Thomas, part of the All-Star Band at Rockin' Christmas Party 2002.

Jingle bell time will be here before you know it and whether you're naughty or nice, be sure to put Rockin' Christmas Party II on your holiday wish list. Once again, Vincent and Illona Wolanin, together with Dr. John Kagan and Liz Kagan are sponsoring THE ultimate holiday get-together to benefit The Children's Hospital of Southwest Florida.

The fun is set for Saturday, December 13 at PrivateSky® Aviation (SWFL International Airport). Partygoers will rock the night away to tunes performed by internationally known musicians who make up the "All-Star Band."

Great music, delicious food, wonderful people and a unique auction (just in time for holiday gift-giving) make this

an evening not to be missed. Come on out, help a great cause and enjoy the event that put the "FUN" back in Fundraiser.

If you plan to party yourself, or need the perfect gift for that "hard to buy for" person, be sure to call for tickets today. They are \$175 each to dance and mingle and \$550 per couple for preferred seating. Group rates are also available.

Call the Lee Memorial Health System Foundation at 437-1840 for tickets. Sponsorship opportunities are still available. Visit www.RockinChristmasParty.com for more information.



Rockin'
Christmas Party 11

Reflections from the Board Chairman



*Joseph R. Catti, Chairman
LMHS Foundation Board
of Trustees*

I became Chairman of the Lee Memorial Health System Foundation Board of Trustees in November 2002. Many charities were facing fund raising deficits at that time due to downward economic trends and the uncertainty of world events.

Thanks to YOUR generosity, just the opposite is the case with the Lee Memorial Health System Foundation. This year, contributions from nearly 5,000

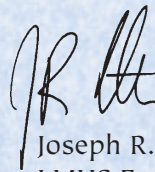
individuals, businesses and organizations will total over \$6 million - an all-time high for our organization.

Thank you for your lifesaving donations. While you may never get to meet all the people you have helped... tiny premature babies, heart patients receiving a new lease on life, children and adults battling cancer... please know you have made a tremendous difference in their lives. In many cases, you have given them the gift of life itself.

The year ahead brings with it many challenges for health care. Breakthroughs in medical research, advances in technology and new medicines offer great promise to us all. Your donations help bring these advances to Southwest Florida and prevent the need for travel to Tampa, Miami or other cities.

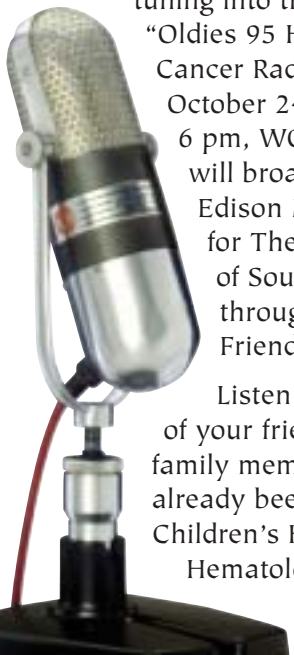
As we move toward the close of another year, I am pleased to share with you images of just a few of the patients who have been touched by your kindness. They are representative of your many neighbors, friends, associates and family members who receive care from Lee Memorial Health System every year.

On behalf of the Lee Memorial Health System Foundation, and especially the many patients who have been helped by your generosity, I offer my sincere thanks and gratitude.



Joseph R. Catti, Chairman
LMHS Foundation Board of Trustees

Tune In To Help!



Crank up the radio, pick-up your phone and help save a life by tuning into the second annual "Oldies 95 Helping Kids with Cancer Radiothon" on Friday, October 24 from 6 am to 6 pm, WOLZ-FM - Oldies 95 will broadcast live from the Edison Mall to raise funds for The Children's Hospital of Southwest Florida through Barbara's Friends.

Listen and hear the stories of your friends, neighbors and family members who have already been touched by The Children's Hospital Hematology/Oncology

Program. Your donation stays right here in Southwest Florida and will be used to provide care for children throughout our community.

There are lots of surprises in store for lucky listeners who phone in their pledges. Celebrities, dignitaries and civic organizations will all be on hand to take your phone calls and offer thanks for your support.

This is a great opportunity for your business, organization or civic group to get involved in a



Guest DJ's Chase and Ben (from left) get ready to offer some pointers to WOLZ-FM Oldies 95 morning man Rick McGee in preparation for the Radiothon set to air October 24.

worthwhile community cause. For information on how you can help, or if you'd like to get a head start on giving, please call 437-1840.

Lee Memorial Health System Foundation Welcomes Two New Board Members

Robert Galloway is Vice President of The Galloway Family of Dealerships and a life long resident of Fort Myers. He has been an active participant in the family business for over 20 years. He and his wife Tracey hold The Children's Hospital of Southwest Florida near and dear to their hearts. Their twins, born 2 months premature and now 18 months old, spent weeks in the NICU at The Children's Hospital.

Jean Marshall, a new Cape Coral resident, has had a distinguished 30 plus year career in health care planning and administration and has been frequently recognized for her work in improving the health and welfare of minority populations. She has sought diversity throughout her career by relating to others by living in their world. She was most recently Vice President of government and community relations for Meridian Health System in New Jersey.

Briefs or Bikinis?

It was anyone's guess as over 150 theatre lovers and supporters of Lee Cancer Care enjoyed the hilarious performance of Steve Martin's "Underpants" on Thursday, August 21 at the Florida Repertory Theatre in Fort Myers. News-Press columnist, "The Downtown Diva" scoured the town seeking "designer underwear" from local celebrities. Even the City of Palms city council got into the fun by creating a stunning pair of boxers signed by council members. Proceeds went to support cancer services at Lee Cancer Care.



Dr. Jimmy Orr, Lee Memorial Health System Foundation Board Member and Medical Director of Lee Cancer Care admires the "underpants" he purchased as part of the benefit.

When one door closes another door opens; but we so often look so long and so regretfully upon the closed door that we do not see the ones which open for us.

— Alexander Graham Bell

Tee it up for the Trauma Center

Do you like golf, great food, meeting other people, a chance to win wonderful prizes AND helping a worthy cause at the same time? Then, by all means, please take part in the Special Angel Fundraiser to benefit Lee Memorial Health System's Trauma Center.

As part of the fundraiser, you're invited to join others for golf on October 27 at Pine Lakes Country Club or on November 3 at Lake Fairways Country Club. The fun begins at 11 am each day. Both clubs are located in North Fort Myers.

Your \$55 entry fee (your choice of date and course) entitles you to one round of golf, cart fee, snack, beverages on course, a chance to win fabulous prizes and entry to the dinner/awards ceremony. Best of all, you'll be helping people who receive care from Southwest Florida's ONLY Trauma Center.

We expect this event to sell-out quickly. For more information and a registration form, contact the Lee Memorial Health System Foundation at 437-1840. Don't get left behind!



PINE LAKES
Country Club

October 27

Lake Fairways

November 3

Community Partners



A little help from my friends. Whether molding clay or shaping healthy outcomes, The Barbara's Friends Outpatient Hematology/Oncology Center at The Children's Hospital of Southwest Florida provides extra touches not available anywhere else. Events and fundraisers provide services, equipment and staffing for young patients while the Barbara's Friends Endowment Fund, now totaling over \$1 million, ensures perpetual continuation of pediatric cancer services.



A new day dawns. Out of tragedy rises new hope. Thanks to events such as Sanibel Cares, the magnificent dream of creating The Chrissy Brown Inpatient Cancer Unit at The Children's Hospital of Southwest Florida will soon become a reality. Spearheaded by Sanibel residents Steve and Lena Brown, fundraising efforts garnered more than \$1.5 million in support from throughout all of Southwest Florida. Construction is expected to begin in 2004.



Gentle touches. Not your ordinary golf tournament, the Boston Red Sox Children's Hospital Celebrity Classic has nurtured and saved the lives of thousands of children during its ten-year history. The 2003 edition raised over \$470,000 for equipment and care required by children with special needs including those who must cope with the challenges associated with premature birth.



Smooth sailing over rough waters. The S.S. Hope event at Gulf Harbour Golf & Country Club takes partygoers to exotic locations throughout the world. Thankfully, funds raised are used right here at home to chart courses to recovery for patients in The Children's Hospital's Pediatric Intensive Care Unit. The 2002 edition brought in over \$150,000 to help local children and infants with equipment and services.

Making a Difference



Sound medicine. It once took many months, and - in some cases - years, for hearing problems to be diagnosed. Thanks to nearly \$11,000 in grant support from the Hearing Research Institute and \$65,500 in gifts from Children's Hospital donors, problems are now detected before newborns ever leave the hospital. Over 4,600 babies are screened every year.

Happy trails. Up to 80% of child safety seats are installed incorrectly. The Children's Advocacy Program at The Children's Hospital of Southwest Florida, supported by \$45,000 from Lee Memorial Health System Foundation, helps expectant and new parents obtain and properly install safety seats to help protect the most precious cargo in the world.



AFLAC Hits a Home Run! Kenny and his Mom enjoy a break from hospital life with members of the AFLAC All-American East squad. AFLAC ducks, presented as gifts, delighted young patients. Al Johnson, Vice President of AFLAC Incorporated, addressed the crowd prior to a tour of The Children's Hospital of Southwest Florida. AFLAC presented a \$20,000 check to The Children's Hospital in conjunction with the inaugural AFLAC All-American High School Baseball Classic.

Community Partners Making a Difference



Stroke of genius. Who better than a disabled artist to show patients they too can reach for the stars and dream of better tomorrows? The disABLED Artists program, supported by \$18,000 in gifts from the Ethel & W. George Kennedy Family Foundation, helps many patients add color and meaning to their lives. Lee Memorial Health System Foundation provided \$50,000 to support program initiatives.



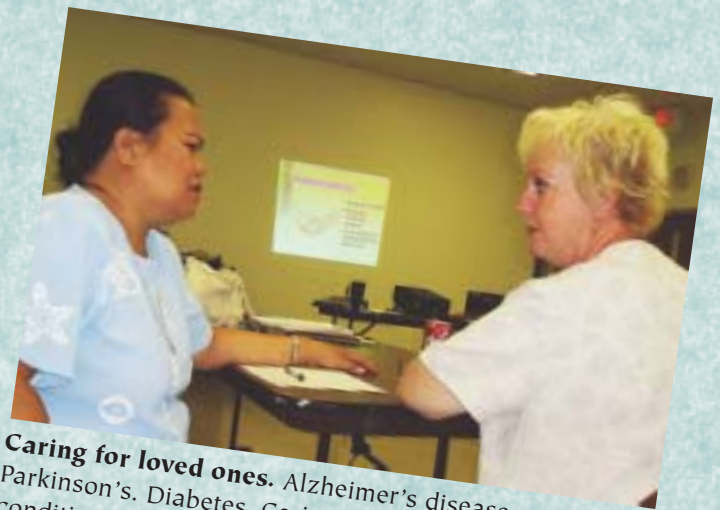
Good hearted. Generous residents of Gulf Harbour Golf & Country Club donated \$45,000 from their 2003 Members Memorial Tournament to Lee Cardiac Care. The gift was used to purchase an Intra-aortic balloon pump for use at HealthPark Medical Center.



Reaching out. Community members receive regular health screenings and related services through the Lee Memorial Parish Nurse Program. The Blue Foundation for a Healthy Florida made a grant of \$40,000 to underwrite activities while The Southwest Florida Community Foundation provided seed money of \$10,000 to bring vital services to those areas most in need.



Help and hope - a winning combination. Several individuals and organizations helped Lee Cancer Care expand and enhance their clinical and education services over the past year. Through the generosity of Phyllis Blanchard, the Blanchard Education Endowment grew to \$300,000. Saks Fifth Avenue, the Prendergast family, the Minnesota Twins, the Realtor Association and the American Postal Workers Union together contributed an additional \$165,000 for equipment and expansion of services in support of our patients and families.



Caring for loved ones. Alzheimer's disease, Parkinson's, Diabetes. Caring for loved ones with chronic conditions got a little easier thanks to a \$133,000 grant from Senior Solutions of Southwest Florida. Funding allows Lee Memorial to offer seminars focusing on coping strategies for those in caregiving situations.

Charitable Gifts of Stock

by A. Scott White, Certified Financial Planner



When most people think of giving to a charity, they usually consider giving their time or making a cash donation. Rather than cash, some donors may want to consider giving away a growing asset, for example, common stocks. These donors should keep two things in mind. First, the capital gains tax is a

voluntary tax—you only pay it if you sell an appreciated asset. The estate tax is involuntary—it's due nine months after death essentially no matter what. One philanthropic way to avoid both these taxes is to give highly appreciated securities to a charity.

Charities are tax-exempt entities. When someone gives these types of assets to charities there is no tax on their appreciation. They have also removed this asset and all future appreciation from their taxable estate. Finally, they receive a current income tax deduction for the contribution.

Sometimes donors hold a stock position with which they are comfortable and from which they expect continued success from in the future. They also plan to make a charitable gift for the year in cash. One variation on charitable giving is to make a gift of the favored stock and replace the position with the cash. This effectively removes the past appreciation by giving the replacement

stock a kind of “stepped up” cost basis.

Charities are broken down into two types, 50 percent charities and 30 percent charities. The percentage refers to the maximum percentage of adjusted gross income (AGI) that may be claimed as a charitable deduction by a donor in any one year. Fifty percent charities include churches, schools, hospitals, endowment funds for public universities, and state and local governments. Special rules apply to other types of private charities.

Gifts of capital gain property, such as stocks, are subject to further limitations. To qualify as a donation of capital gain property the item must qualify for capital gains treatment (e.g. property held for investment) and must have been held for more than one year. Gifts of capital gain property to 50 percent charities are limited to 30 percent of AGI. Donations of capital gains property are generally valued at the fair market value at the time of the donation.

Gifts of appreciated securities can also play important parts in more sophisticated charitable giving techniques, such as charitable remainder trusts. If you are considering such strategies and would like to maximize the benefits of your gift, talk to a financial planner to explore your alternatives.

For more information about making gifts of stock, please call the Lee Memorial Health System Foundation at 437-1840.

Partners in Philanthropy Levels of Giving

SUPPORTER - Donors of \$1 - \$99 will be recognized in LMHS annual Community Report, as will all donors.

AMBASSADOR - Donors of \$100 - \$999 will receive mailed notification of health seminars, invitations to special events and the Foundation newsletter.

PARTNER - Donors of \$1,000 or more annually will be listed on a distinctive plaque placed in the LMHS medical center of their choice. They will be invited to the annual Evening of Appreciation Reception to honor outstanding LMHS philanthropists.

PATRON - Donors of \$10,000 or more will be given lifetime recognition status, with their name inscribed on a distinctive plaque in the medical center at the level commensurate with their gift.

BENEFACTOR - Donors of \$100,000 and above, either outright or cumulative, receive special recognition commensurate with their generosity. Their name will be inscribed on a distinctive plaque located at each of the LMHS medical centers.

DONORS OF \$250,000 and above will receive special recognition tailored to their level of giving and exceptional generosity.

**LEE MEMORIAL
HEALTH SYSTEM**

FOUNDATION

Funding Tomorrow's Healthcare Today

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www.LeeMemorial.org/foundation

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*For more information or
to make a donation, please
call the Foundation office at
(239) 437-1840.*

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2003/2004 UPCOMING EVENTS

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|--------------------|---|--|--|
| Oct. 24 | 2nd Annual Oldies 95
Helping Kids with
Cancer Radiothon | Dec. 13 | Rockin' Christmas II |
| Oct. 25 | Jazz On The Green | Feb. 20, 2004... | 11th Annual Boston Red
Sox/Children's Hospital
Celebrity Classic |
| Oct. 27 & Nov. 3 | Special Angel
Fundraiser Golf
Tournaments for LMHS
Trauma Center | Feb. 26, 2004... | Minnesota Twins/Lee
Cancer Care Celebrity
Golf Tournament |
| Oct. 31-Nov. 2 ... | Ferrari Festivale | Event dates subject to change. For the
latest information on these and other
events, contact Lee Memorial Health
System Foundation at 437-1840 or visit
us on the web at
www.LeeMemorial.org/foundation . | |
| Nov. 13 | An Evening of
Appreciation (Reception
& Recognition) | | |

LEE MEMORIAL HEALTH SYSTEM FOUNDATION MISSION: *To expand and enhance the role of philanthropy
and the Foundation in accomplishing the mission of Lee Memorial Health System.*