

The Gift of a Lifetime Legacy

The Deju Family Joins John Muir Health in the Fight Against Cancer

Raul and Shari Deju know first-hand that giving back not only impacts others with positive outcomes, but also brings them indescribable joy. They are thrilled to be John Muir Health legacy donors, contributing to the Cancer Pavilion that will house the UCSF-John Muir Health Cancer Center.

"We are delighted that our philanthropy is making a difference for other people," Shari explains. "Raul and I have different upbringings, cultures, and families but we have the same set of values that serve as a guide to our contributions."

Shari grew up in the rural eastern Washington state community of Kennewick, close to the banks of the Columbia River and near the Hanford Nuclear government site. "We had many chores on the farm and a lot of school work," Shari recalls. "Life was hectic but we knew we would always work things through together." Today Shari spends a great deal of time creating magnificent quilts for family and friends, showcasing her creativity.

Days before Raul's 14th birthday when the Cuban government would have considered him for military duty, he legally immigrated to Florida. "I came to this country with nothing...alone with no money, and no parents," Raul explains. "It is a privilege to have the opportunity to donate to deserving charitable organizations." Nothing has stopped him since he arrived in Miami, Florida. By age 20 he had earned a bachelor's degree in Math and Physics and by age 22 he received a Doctorate in Hydrology (Water Resources). Within a year of graduation, he had published one of the first books in Hydrology and many articles in his field.

The Deju's have traveled all over the world. Raul has enjoyed his work as CEO, President and other key positions of several global, multi-billion-dollar companies, written seven additional books, taken several companies public, taught at large universities, and worked around the world, including advising various government leaders of both parties on NAFTA and energy policies. But their residence in the East Bay over the past 34 years remains home for Raul and Shari. He still works in the world of private equity as a partner at Brightstar Capital Partners, a private equity firm partnering with companies owned by families, founders, and entrepreneurs.

"There are many ways of giving back beyond just writing a check," Raul adds. "My time, my Rolodex, my service on committees, and my lifetime connections are all part of how I can help build the best future for all of us and generations to come." As part of inspiring the next generation of business creators, Raul founded the Institute of Entrepreneurial Leadership and has mentored students who have created companies collectively with current annual revenue exceeding \$5 billion dollars. A year ago, Raul and a couple of his friends created a free, online interactive entrepreneurship program that can be used anywhere in the world. In fact, since its launch, more than 200,000 students have begun taking the course. He also serves on the Board of his



Raul and Shari Deju

alma mater's foundation, the New Mexico Institute of Technology, where he and Shari built a University Center and will soon be launching a major national hydrologic center.

Even with all his professional success, Raul and Shari say their greatest achievement is having a growing family and a large group of friends who want to help their fellow Americans. The Deju's feel a deep connection with John Muir Health. "This hospital is an important part of our lives," Shari explains, remembering the care her mother-in-law received when battling cancer. "The new UCSF-John Muir Health Cancer Center will be a place offering the very best care to people in our local community to fight this dreadful disease." Raul adds "We are very proud to be part of this exciting project as early contributors and funders."



We are delighted that UCSF and John Muir Health came together to create a world-class cancer center in our backyard.

Welcome to Legacy!



Michael G. Crvarich, CPA
Vice President
Legacy Giving



Mary Sherman, CSPG
Program Manager
Legacy Giving

Celebrating Commitment

Commitment is defined as a willingness to give your time and energy to something you believe in, or a promise or firm decision to do something. Commitment leads us to action, and these actions bring us closer to making our dreams a reality. Without commitment, nothing happens.

As our journey continues around the Legacy Compass, 2022 is a year to celebrate the John Muir Health value of “Commitment”. Commitment flows out of integrity and creates a community of care, compassion, and teamwork. You are among those most committed to advancing the mission of John Muir Health and for this we are so thankful.

In the pages of this newsletter we hope to celebrate the many ways in which you have supported the vision of John Muir Health through your long-term philanthropic planning, but also provided John Muir Health with the courage and confidence to move in new directions of providing world-class care, knowing the community will be there in support of its mission.

The commitment of John Muir Health to the community was on great display in October of 2021 during a Groundbreaking Ceremony for the new Cancer Pavilion on the Walnut Creek Medical Center campus. Scheduled to open in February 2024, this new Cancer Pavilion will provide local access to world-class, comprehensive cancer care, close to home.

In the pages of this newsletter, we hope to share with you inspiring stories of those who have creatively supported this revolution in cancer care, as well as provide you with some charitable giving options should you desire to join us in achieving our dream of making this state-of-the-art cancer facility available to the community.



John Muir Health Leadership Team at the 2021 Cancer Pavilion groundbreaking

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
- 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 of Caring and Giving that is meaningful to you and your family, please contact the Office of Legacy Giving at (925) 941-2120 or Michael.Crvarich@givehealthjmh.org or Mary.Sherman@givehealthjmh.org

The “Art” of a Blended Gift

When thinking about making a charitable commitment to a cause you deeply care about there are many options available – gifts of cash, marketable securities, real estate, etc. Often your desire to make a gift and the impact you hope to make inspires you to think – *How can I help?* In these moments, there are some creative solutions to help you achieve your philanthropic goals that blend various forms of giving that may not be readily apparent at first glance.

This article highlights the story of a couple, who have a deep passion and long history of service to John Muir Health, who creatively put together a philanthropic plan to support the new Cancer Pavilion. Given their own experience, this vision of supporting a project that provides world-class compassionate care close to home for those who suffered from cancer, compelled them to act.

In designing a plan, they creatively put together funding for the project using three different sources:

- making a recommendation to the sponsoring organization of their Donor Advised Fund (see back page)
- using a portion of their Individual Retirement Account to make a charitable gift (IRA Rollover Gift)
- including a provision in their estate plan to support the construction of the Cancer Pavilion



Proposed art commission for the future Cancer Pavilion, by artist Joe O'Connell, titled “Uplifting Together”

This blended gift also provided this couple with an opportunity to be recognized and connect their personal values with the role public art will play in the new Cancer Pavilion. The public art features, designed to create a welcoming, calming, healing and uplifting space for patients, visitors, and staff, are consistent with the values of the donor and their hope for what their philanthropy will achieve. Truly an “artful” gift of great impact!



The Cancer Pavilion is something we are all going to be proud of as a gift to our community.

— **Mike Thomas**
Executive Vice President and
Chief Transformation Officer
John Muir Health



Your Legacy & Commitment Matters

Planned gifts continue to grow in popularity as a way to support John Muir Health. In fact, over the past several years, the John Muir Health Foundation has received more than \$13.5 million in legacy gifts and commitments.

The diversity of areas across the health system benefiting from these gifts is inspiring and includes:

- Behavioral Health
- Cancer Pavilion
- Cardiovascular Services
- Diabetes
- Digestive Health
- Internship Programs
- Nursing Education
- Pediatric Oncology
- Unrestricted Gifts (for use where most needed)

We are honored by these commitments, recognizing that these donors have elevated John Muir Health Foundation to that of a “family member” by including us in their estate plans.

In addition to the variety of areas benefiting from these gifts, there are various ways in which donors have structured their philanthropy to achieve their personal philanthropic goals.

Legacy donors have created plans that:

- pay fixed reliable income for life to either themselves or loved ones
- create an endowment at the Foundation that will provide annual distributions to a designated area or program in the Health System in perpetuity
- provide immediate and transformative support for purchasing life-saving equipment
- blend outright gifts of cash with future support through their estate

We are grateful for these amazing commitments that continue to help John Muir Health fulfill its mission of improving the health of the community we serve with quality and compassion. **Your Legacy Matters!**



Donor Advised Funds (DAFs)

So...you want to be philanthropic but you are not sure which charitable organization to support. You also want to give strategically so you maximize your taxable deductions in any given year. One option to achieve these goals is to establish a Donor Advised Fund.

Over the last 15 years, DAFs have increased in popularity as a way of managing gifts to charities and the John Muir Health Foundation has been a grateful beneficiary of the distributions from many DAFs to support patient care, life-saving equipment and capital projects.

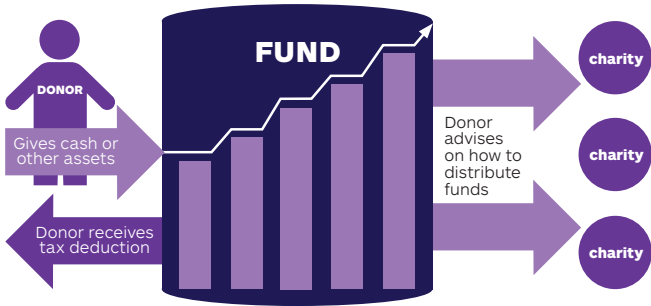
Quite simply, a DAF is a charitable account, established through a public charity or a financial planning firm known as a sponsoring organization. Contributions to a DAF provide immediate tax benefits while allowing the donor time to decide how much and which charities and projects they wish to support.

In a nutshell, DAFs are a savvy way to be philanthropic. If you are interested in learning more about Donor Advised Funds, please reach out to John Muir Health Foundation's Office of Legacy Giving via email at:

michael.crvarich@givehealthjmh.org
or call (925) 941-2120.

You can look at DAFs like a bucket that holds philanthropic funds intended to be distributed at a future date, however, there are a couple of rules that should be considered:

- DAF contributions are irrevocable—non-refundable
- Donors may advise regarding fund distributions, however, the sponsoring organization must approve the designation(s)
- Undesignated DAFs may be distributed to charities named in the donor's estate plans



Where There Is A Will... There Is A Way

Looking for peace of mind around your estate planning? Unfortunately, approximately 50% of Americans do not have a basic estate plan in place that will allow for the orderly distribution of assets to their heirs and favorite charities.

Having a basic estate plan in place, which includes a will, revocable trust, health care directive, and durable power of attorney is a wonderful way to care for your family and ensure that your wishes are known, particularly around end-of-life issues.

One of the most significant barriers to putting a plan in place is cost and access to legal assistance. Enter FreeWill.com. FreeWill is an on-line self-help legal tool and in less than 20 minutes you can write a legally valid estate planning document—for free! FreeWill is the #1 provider of wills in the United States and is valid in all 50 states. The beauty of this is that documents can also be updated as frequently as needed based on qualifying life events.

You may be asking, "What's the catch?" Surprisingly, there is no catch. As a health care organization, John Muir Health's mission is to improve the health of the communities we serve with quality and compassion. We believe offering FreeWill to you is a way of improving the health of the community by making sure basic legal help that can assist your family is available to you.

Of course, by using FreeWill you will have the opportunity to name John Muir Health Foundation as a charitable beneficiary of your estate, but there is no obligation to do so. This online, self-help legal tool is free and the option to leave a legacy is up to you!

We encourage you to go to www.FreeWill.com/johnmuirhealthfoundation.com or use the QR Code (at right) to check it out or contact us for more information. Please feel free to share this link with whomever you would like. FreeWill is available to everyone.



**August is
National Make
A Will Month**



FREEWILL