

Methodist Legacy Society

Join Generations of Generosity

When you become a member of the Methodist Legacy Society, you're helping our patients and our communities today and tomorrow. Your planned giving ensures that we will always be able to live our mission and support the way Methodist cares, educates and innovates.

The Methodist Legacy Society recognizes special friends who remember Methodist Hospital Foundation or Nebraska Methodist College in their estate plans.

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| Tom Elser | Beverley Karrer | Larry & Linda Pearson | And our friends who wish to remain anonymous |
| Bonnie Erickson | Jane M. Kercher, M.D. | | |

Learn more about Methodist Legacy Society and the forever impact of your gift. Contact Dana Ryan, philanthropy officer, at (402) 354-4825 or Foundation@nmhs.org.



Methodist Hospital Foundation
8701 W. Dodge Road, Suite 450
Omaha, NE 68114

Your Methodist Legacy



Our employees repeatedly give us feedback on how simulation prepares them for real-life scenarios and increases their confidence working with patients."

Michelle Peacock, MSN, RN | Staff Development Nurse

MISSION IN ACTION: THE WAY WE INNOVATE

New high-tech AI simulator to train families and staff.



Forward with Heart

Advancing Cardiac Care at Methodist Hospital

Omaha's Ed Finan knows the value of leading-edge cardiovascular care. He just didn't think he would need it.

"I considered myself very healthy. You're working out. You try to eat right," Ed said.

But last year, there came a point when he knew something was off. His heart rate would skyrocket during exercise—and it would remain elevated long after he stopped. Plus, he felt more fatigued than usual. The culprit: atrial fibrillation (Afib), an irregular heartbeat.

"I think it's really important for people to know that Afib is serious and that it can happen to anybody," said Ed's wife, Anne. "I definitely had some scary thoughts about it because of so many things that can happen with Afib."

After consulting with his care team at Methodist Hospital, Ed decided to move forward with a cardiac ablation. The procedure resolved his Afib.

"The care we received was phenomenal," Ed said. "It's great to be able to pay it forward."

The Finans are among those generously supporting the creation of a new cardiovascular education center and simulation lab at Methodist Hospital. This investment in innovation is designed to get cardiovascular patients back to their homes, their families—and their lives—as quickly as possible.

"This project is so important to Methodist for so many reasons," said Josie Abboud, president and CEO of Methodist Hospital and Methodist Women's Hospital.

It will lead to enhanced training for staff as well as comprehensive education for patients and families, allowing them to feel more confident and prepared leaving the hospital. Optimally, that will lead to shorter hospital stays and fewer readmissions.

"We have new approaches to medicine, so we need to have new approaches to educating our patients," said Carrie Phillips, service executive of Methodist's rapidly growing critical care and cardiovascular service line.

Cardiovascular Service Line Growth Since 2019

- 131% WATCHMAN procedures
- 109% Cardiothoracic surgeries
- 63% Cardiac catheterization/electrophysiology lab
- 25% Diagnostics

The cardiovascular education center is designed for patients and families to confer with caregivers in a private, non-clinical setting; engage in crucial pre- and post-op education; and use models to practice injections, IV care and other skills that will be necessary after leaving the hospital.

The adjoining simulation lab will be equipped with lifelike Hal S5301 and SUSIE S2000 training simulators. The AI-enhanced robots will allow Methodist caregivers to practice trauma scenarios and medical emergencies onsite, including intubations, tracheotomies and chest tube insertions. The lab also opens new partnership opportunities for rural providers in need of specialized cardiac training.

Your Methodist Legacy

WHAT'S INSIDE:

Forward with Heart: Help Us Advance Cardiovascular Care at Methodist Hospital



Women Connect: Comfy, Casual and Impactful



Donor Advised Funds: The Right Giving Option for You?



For All WOMEN

GOAL ACHIEVED

Thank you for helping us expand Methodist Women's Hospital with \$16.3 million in support.

Because of you, more women will have access to quality, compassionate care at every stage of life.

Scan to see more pictures of the expansion and take a video tour or visit MethodistHospitalFoundation.org/ExpansionPhotoGallery-2024

Your Planning Roadmap

Estate planning is an opportunity to create your legacy and make our communities healthier places to live.

If you've put off writing your will or making plans for your estate, you're not alone. Don't wait to take the first step.

Beyond Retirement: Your Planning Roadmap is a free resource to help launch your planning journey. Request a copy using the enclosed reply envelope or download now at MethodistHospitalFoundation.org/YourLegacy.

Your Journey Starts Here

If you've put off writing your will or making plans for your estate, you're not alone. Estate planning is not a chore. It is an opportunity to create your legacy.

Don't wait to take the first step—you may actually feel relieved as you get things in order. Plus, you can rest easy knowing that you are setting your family up for success. And there is a legacy you wish you can be proud.

Here are five straightforward steps to consider on your planning journey:

- STEP 1: Know what you have.** Your first task in planning is to figure out what you have. Your assets should include:
 - Assets, including the estimated value and whether they are held in your name, jointly or in certain trusts, or community property
 - Debts and liabilities
 - Life insurance policies, including policy owners and beneficiaries
 - Retirement and savings plans along with named beneficiaries
 - A list of charitable organizations that are close to your heart
 - The location of your will or other documents
- STEP 2: Make key decisions.** An open dialogue with loved ones is the most important step in your planning journey. Without this vital document, state law will usually govern your estate according to a rigid formula that probably won't match what you want. Don't get into state law battles without consulting with an estate and legal professional you want to consult through your will.
- STEP 3: Choose your team.** You don't have to go it alone with estate planning. The right team is essential to help with this journey. Working together with a team of professionals can help you make the most of your resources.
- STEP 4: Make it official.** One of the best steps in your planning journey involves creating documents with your new estate documents. Before this happens, take time to consider your decisions and the time you've made as your wishes are clear. This information is useful for when your attorney reviews your individual circumstances and helps you through the final document creation. You are thinking about making a gift to the Methodist Hospital Foundation or other charities, so it's helpful to meet with an attorney, or with a lawyer to meet with and any other legal services you may be needed to ensure any questions they have, with no obligation.



“The simulator is really important,” said Adam Wells, M.D., a pulmonologist at Methodist Hospital. “Simulation allows us to safely and effectively perform a procedure, manage a patient and experience a crisis—even a bad outcome—in a safe, protected environment where there’s room to debrief, make mistakes and ask questions.”

Staff development nurse Michelle Peacock, MSN, RN, is another strong proponent of simulation.

“Our employees repeatedly give us feedback on how simulation prepared them for real-life scenarios and increased their confidence when working with patients,” Peacock said.

Lead staff development nurse Alex Moore, MSN-RN, sees a lot of value for

newly licensed nurses who are now treating patients with more severe, life-threatening conditions.

“Literature supports the use of simulation to supplement learning and to support a safe and effective transition to practice,” Moore said. “With a simulation lab and dedicated education space, we can positively impact the nurses’ skill set, competence, confidence and readiness for complex patient scenarios.”

Methodist Hospital Foundation is fundraising for the project. It will be named in honor of Dr. Matthew Latacha, a beloved Methodist cardiologist who died last year.

“It was so important to Dr. Latacha to return his patients back to living their lives to the fullest. He was an amazing

physician, personally invested in his patients’ success,” Abboud said.

Finan was one of Dr. Latacha’s patients. He and Anne remember him as extremely knowledgeable—a very good educator—who had a bedside manner that put them at ease.

“When I found out Dr. Latasha was killed, it was heartbreaking,” Anne said. “I instantly thought of my interactions with him—from that initial visit to coming out to see me after Ed’s procedure, just how kind and patient he was.”

“It’s a tragic loss,” Ed said. His strong recovery is a credit to Dr. Latacha’s expertise and a testament to the caregiver’s legacy.

“We are very grateful for the service and the care we received,” Ed said.

MISSION IN ACTION: THE WAY WE CARE

Women Connect

Encouraging Healthy Living and Impactful Giving



Sometimes when you’re trying to move the needle in community health, you wind up creating a movement.

That’s what happened after Methodist Hospital Foundation launched Women Connect, our way of educating and empowering all women to prioritize their health. Four events, so far, have focused on breast health, heart health, puberty through menopause, and skin health.

“A real community is forming at these events,” said attendee Kathy Wilson.

Accessibility is a cornerstone of Women Connect. All events are casual and free. Each includes a panel discussion with Methodist experts and a slate of healthy living experiences. They’ve included free skin spot checks, massages, yoga, flu shots and more. Guests also have a chance to give back—and make an impact—as part of every event.

Since launching Women Connect in 2022, this community has:

- Helped cancer survivors by supporting Inner Beauty, a specialty salon at Methodist Estabrook Cancer Center
- Fought period poverty by purchasing and packing menstrual product kits for Methodist patients and students in need
- Provided heart monitoring equipment to dozens of Methodist patients in need
- Connected more than a dozen uninsured women to potentially lifesaving screenings by sponsoring a Methodist Mobile 3D Mammography visit to the Latino Center of the Midlands

Put yourself on the list! Join our Women Connect community by visiting MethodistHospitalFoundation.org/WomenConnect.

MISSION IN ACTION: THE WAY WE EDUCATE

We All Need Champions

Our donors are champions for Nebraska Methodist College—The Josie Harper Campus and its hardworking students.

Your support helps the college in multiple ways—funding scholarships, emergency financial assistance, mobile health clinics and more.

It’s good for the college, the individual, our communities and Methodist Health System. We see the positive impact. Alums like Koren Gabriel—and so many others—are making a difference for Methodist patients right now.

Koren saw her NMC education as a way out of poverty for her and her two children. She juggled single parenting, classes and part-time work. Her drive earned her The Jerry and Tim Scholarship and other awards.

“With all of the things that are in my way, I still did it,” Koren said. “Not one person can take that from me.”

A 2023 graduate, Koren is now working as a nurse at Methodist Hospital.

Methodist Hospital Foundation will support health care education with just over \$5 million in funding this year. More than \$3.4 million is earmarked for scholarships, including NMC’s first full-tuition scholarship. Awarded through the Scott Scholars Program, it has benefitted 11 students since 2021. Cousins Mu Hei Thaw and Paw Ka Pru Htoo were among the 2022 recipients.

“Being given this support and opportunity allows me to pursue my dream of becoming an international traveling nurse,” Mu said.

The cousins will spend part of the summer in their native Thailand, serving at a refugee camp and shadowing at a local hospital. Enrichment funds, attached to the scholarship, made the experience possible.

The Scott Scholars Program continues to grow. This year, we had a record 65 applicants.



Koren Gabriel



Mu Hei Thaw



Paw Ka Pru Htoo

Greatest Fundraising Need: The Latacha Education Center

We need your support! Help us advance cardiac care at Methodist Hospital by supporting the creation of the Latacha Education Center.

“The bottom line is patients are going to do better because everyone participating in their care feels more comfortable. That results in better patient care and better patient outcomes,” said Dr. Adam Wells.

Thank you for supporting our patients and caregivers—and for helping us move forward with heart.

Make a gift.



Scan the QR code

Donate online at

MethodistHospitalFoundation.org/LatachaEducationCenter

Honoring a Compassionate Caregiver



Dr. Matthew Latacha

Well respected and loved by patients, colleagues and staff, **Dr. Matthew Latacha** (1976–2023) led at Methodist by launching innovative programs, including the WATCHMAN procedure that helps patients with atrial fibrillation decrease their stroke risk.

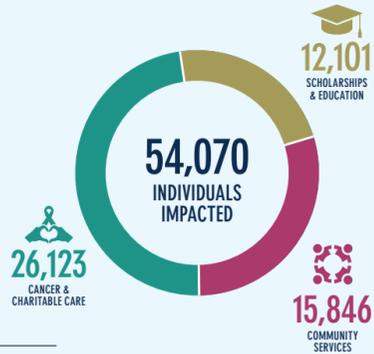
Killed in a cycling accident, Dr. Latacha left behind a wife and three children. The **Latacha Education Center** will continue his legacy of caring—a place where staff can improve knowledge and performance and cardiovascular patients can learn the skills they need to return home with confidence and take charge of their recovery.

“Dr. Latacha’s passion for exceptional care extended to education—whether he was training students or providing information and resources to those he treated. We’re grateful this project will strengthen cardiovascular care while honoring Dr. Latacha’s legacy,” said Tracy Madden-McMahon, president and CEO of Methodist Hospital Foundation.

2023 BY THE NUMBERS

Strengthening the Health of Our Communities by the Way We Care, Educate and Innovate

Your generosity powers our impact.



For the 12 months ending December 31, 2023

Make a Difference for Now and Forever.

- Life Income Gifts — CRUTs and CGAs
- Retirement Plan or IRA Assets
- Bank and Brokerage Accounts
- Life Insurance
- Cash
- Securities
- Real Estate
- Wills or Trusts
- Savings Bonds
- Real Estate

Our team would be happy to answer your questions. Contact Dana Ryan, philanthropy officer, at (402) 354-4825 or Foundation@nmhs.org.

Donor Advised Funds How Do Those Work?

Contributing to a cause you’re passionate about shouldn’t be complicated. A donor-advised fund (DAF) may be a way to simplify your giving to Methodist Hospital Foundation and other charitable organizations.

Think of a DAF as a charitable investment account with the sole purpose of supporting your philanthropic goals.

- Contribute assets like cash, securities and non-publicly traded assets to your DAF.
- Recommend grants from the fund to your favorite charities.
- Watch your account balance continue to grow tax-free over time.



Dana Ryan

Why would someone use a DAF instead of making a gift directly to a charity?

Contributing to a DAF allows you to receive an immediate tax deduction, even if you don’t recommend grants to charities right away. This can be helpful if you have a large sum of money you want to donate but aren’t sure yet how to allocate it.

If you donate to multiple charities, a DAF could also make tax receipting much simpler. You receive a tax benefit for the donations to the DAF (one account) versus managing all of the receipts from the organizations.

How can a DAF help me build a philanthropic legacy?

Naming your children as DAF advisors or successor advisors can be a great way to teach them about your philanthropic values and the importance of giving back.

Beyond that, you can name your DAF as a beneficiary of your will or estate. This will ensure that your remaining assets are used to support the causes you care about after you’re gone.

Do DAFs have restrictions? Is my contribution revocable?

Contributions to a DAF are irrevocable—even though you, the donor, maintain the right to direct those funds. Grants must go to a public 501(c)(3) nonprofit organization recognized by the IRS. No grants to individuals are allowed.

How do I set up a DAF?

If you work with a financial advisor, use them as a starting point. Most financial services have charitable arms for DAF accounts. Be sure to ask about any administrative and investment fees. Omaha Community Foundation is also an excellent resource to find information on DAFs and how to make a local impact with your giving.