

JOIN THE MOVEMENT THAT'S MOVING THE NEEDLE



CHARITABLE BEQUESTS

Leaving a Legacy of Health and Hope





Dear Friend,

I am proud to call Southwest Missouri home. Stone and Taney counties are truly special places, defined by the Ozarks tradition of giving selflessly to support family, friends, and neighbors. Here, we look out for one another and genuinely care for each other.

Through my work with Skaggs Foundation, I've had the privilege of seeing firsthand how the generosity of our community transforms lives. Because of this shared spirit of caring, we are able to collaborate with nonprofits across Stone and Taney counties whose missions align with ours: *to promote health and wellness initiatives throughout our region.*

Together, we are making a meaningful difference—impacting more than 70,000 lives every year. From access to quality medical care, mental health counseling, and school nurses, to scholarships for future healthcare professionals, to life-saving equipment and training for first responders—our mission touches lives at every level. This is proof that when we support one another, we can achieve far more than any one of us could alone.

We are deeply grateful for the generosity of community members who volunteer, donate, and champion Skaggs Foundation initiatives. None of this would be possible without you—thank you.

Inside this booklet, you'll find stories, ideas, and tools to help you explore the opportunity of giving through planned gifts to Skaggs Foundation.

It would be my honor to talk with you about how your legacy can leave a lasting impact in our community for generations to come.

Meghan Connell

Meghan Connell
President, Skaggs Foundation



Table of CONTENTS

3	Our Mission & Community Impact
4	A Donor's Perspective
5	Our Vision & Story
7	What We Fund
8	Our Stewardship Commitment
9	Your Planning Guide
10	Ways to Leave a Legacy
11	Benefits of Legacy Giving
12	Planning Tools That Support Your Legacy
12	Core Estate Planning Documents
13	Legacy Giving Options
14	Next Steps for Your Planned Giving
15	How to Make a Gift to Skaggs Foundation in Your Estate Plan
16	Our Legacy in Action

OTC Foundation: Jr. Eagles at Table Rock Childcare



Our

MISSION & COMMUNITY IMPACT

Supporting community initiatives that improve health and wellness in Stone and Taney Counties.

At Skaggs Foundation, our mission is rooted in a simple but powerful belief: that everyone deserves access to quality health and wellness resources—regardless of where they live or their ability to pay. Since 2002, we've worked to turn that belief into action, improving lives and strengthening communities across Stone and Taney counties.

Everyone deserves access to quality health and wellness resources.



Table Rock Career Center:
New Bus for Health Tech Students

We were born from a deep legacy of care. What started as a hospital foundation has grown into a dynamic and forward-thinking philanthropic organization. Today, we partner with local schools, nonprofits, government agencies, and healthcare providers to fund programs that meet urgent needs and create long-term change. Our work supports individuals at every stage of life and addresses some of the most pressing health challenges facing rural Missouri.

What Legacy Means A DONOR'S PERSPECTIVE

Because every gift carries a story worth telling



Jamille Twedt, BSN, RN, OCN



Healthcare Scholarship Recipients

Thanks to Skaggs Foundation's scholarship program, earning my BSN was far less financially straining on my family. Knowing how vital it is to keep local talent in our community, I joined the Skaggs Foundation Scholarship Committee, a group of medical and academic professionals committed to ensuring scholarships are awarded wisely.

Early in my career, I also began giving back through automatic donations every two weeks. Skaggs Foundation does far more than fund scholarships. It provides lunches for cancer patients during treatment, purchases essential medical equipment, supports transportation needs, and more for those in our community.

As I approach retirement, I wanted to ensure continued support for this mission. Through my estate planning, I arranged a legacy gift to provide lasting, local impact. There are many worthy charities, but as someone who has seen Skaggs Foundation's careful stewardship firsthand, I can say with confidence that giving back here truly makes a difference.

"Legacy giving allows me to make a lasting impact."

Our VISION & STORY



Public Schools:
Cents of Pride Store



Cox Medical Center Branson:
Cancer Center Meals



House of Hope:
Motel Closure Emergency Response

A Vision for Healthier Communities

Our long-term vision is both ambitious and local: to create a future where everyone in Stone and Taney counties can live a healthier, fuller life. To get there, we fund innovative, evidence-based initiatives that remove barriers to care, promote early intervention, and invest in wellness from the ground up. We focus not just on treatment—but on prevention, education, and sustainable change.

We believe in partnerships over silos. That's why we collaborate with community organizations who know their populations best. By aligning resources and working together, we can tackle complex issues—like mental health access, childhood trauma, chronic disease, and substance use—in ways that no single entity could accomplish alone.

We collaborate with community organizations who know their populations best.

This story is still being written.

Our Story of Support

Skaggs Foundation was born from a legacy of care that stretches back generations—a story deeply rooted in service, compassion, and community commitment.

The Foundation was established in 2002 as the philanthropic arm of Skaggs Regional Medical Center. At the time, its purpose was clear: to support local healthcare needs and strengthen the wellbeing of the people served by the hospital. From its earliest days, Skaggs Foundation played a vital role in connecting community members to critical services, helping patients afford care, and ensuring resources were available where they were needed most.

When the hospital became part of CoxHealth, Skaggs Foundation took a bold step forward. Rather than winding down, the Foundation reimaged itself—broadening its reach and deepening its investment in community health. What began as hospital support evolved into a community-centered engine for wellness and impact.

That transformation was more than a shift in structure—it was a shift in mindset. Skaggs Foundation recognized that health doesn't start in the exam room. It starts in classrooms, homes, food pantries, community centers, and everyday moments of support and prevention. And so, our story grew—from a hospital's philanthropic branch into a thriving, independent foundation that collaborates with schools, nonprofits, and local leaders to meet the real, lived needs of our neighbors.

Today, Skaggs Foundation is a trusted source of funding, strategy, and innovation in Stone and Taney counties. We continue to honor the Skaggs family legacy by serving with integrity, vision, and unwavering commitment to those we're here to help.

This story is still being written. And through your legacy, you can help shape its next chapter.



Skaggs Community Hospital - 1950



Original Skaggs Foundation Logo



Skaggs Legacy Endowment Logo



Current Skaggs Foundation Logo

Funding Impact PILLARS OF LEGACY

Through our Legacy Endowment, we fund grants across key community pillars, creating impact.

Access to Care

Improving access to essential services through transportation assistance, mobile outreach, and telehealth —so no one is left behind due to geography or income.



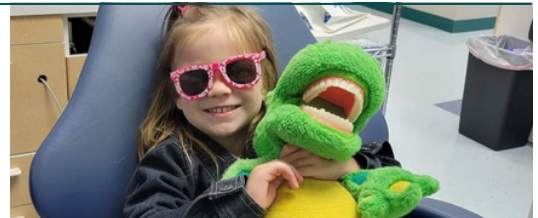
Cox Medical Center Branson: Women's Center Mammogram Machine



Central Taney Fire District: Helipad Ribbon Cutting

Child & Family Safety

Helping children and families thrive through safe environments, parenting resources, crisis intervention, and protective services.



Children's Smile Center: Stainless Steel Crowns for Children

Dental Care

Providing access to screenings, cleanings, fluoride treatments, and restorative dental care for children and families who might otherwise go without.



Christian Action Ministries: Community Garden

Healthy Lifestyles

Promoting wellness through physical activity, nutrition programs, chronic disease prevention, and education that encourages lifelong healthy habits.



Hope Counseling Center

Mental Health

Supporting early intervention, school-based counseling, crisis care, and therapy services that help individuals and families build resilience and emotional well-being.



The Brook Wellness Center: Marijuana Brief Intervention Program

Substance Use

Funding prevention, treatment, recovery support, and education efforts aimed at reducing substance misuse and helping individuals reclaim their health and lives.

Our STEWARDSHIP COMMITMENT

At Skaggs Foundation, every dollar entrusted to us reflects a donor's faith in our mission—and we don't take that lightly. Stewardship is not just a responsibility; it's our promise.



*Cox Medical Center Branson Cath Lab:
Blood Pressure Cuffs*



Options Pregnancy Clinic: Dad Prep Program

Our financial practices are rooted in transparency, accountability, and long-term sustainability. We undergo independent annual audits, and the Skaggs Legacy Endowment is one way we turn smart financial strategy into lasting community impact—funding meaningful projects without touching the principal.

When donors give to a specific program—meals for cancer patients, school nurse supplies, or transportation assistance—we honor that intent fully.

100% of every gift goes directly to improving health and wellness in Stone and Taney counties. Every time.

Earning trust is one thing. Keeping it is everything.



OTC Foundation: Jr. Eagles at Table Rock Childcare

Earning trust is one thing. Keeping it is everything.

Your LEGACY PLANNING GUIDE



Boys & Girls Club of the Ozarks:
Triple Play Program

What is Legacy Giving?

This guide is designed to help you explore the meaningful process of leaving a legacy that reflects your values and supports the future of health and wellness in Stone and Taney counties.

Here, you'll find clear, helpful information about what legacy giving is, the different ways you can make a planned gift, and the benefits of doing so. We've included an overview of how your gift can make a lasting impact, and simple planning tools to help you organize your thoughts and intentions.

Whether you're ready to begin your legacy journey or simply exploring your options, this guide is here to support you—at your own pace, on your own terms. There's no pressure or obligation—just a resource to help you plan with purpose and peace of mind.

Thank you for considering how your legacy can make a lasting difference in the lives of others.

Legacy giving is the act of planning a future gift to a nonprofit organization through your estate or long-term financial strategy. Unlike a donation made today, a legacy gift allows you to make a lasting impact—often without affecting your current financial resources.

At its core, legacy giving is about aligning your values with your actions. It's about making a commitment to future generations and supporting the causes that matter most to you, even after you're gone.

Whether it's a gift through your will, a beneficiary designation on a retirement account, or a life insurance policy, legacy giving gives you the opportunity to leave a meaningful mark on your community—and ensure your story continues to support the well-being of others.

*A legacy gift allows you
to make a lasting impact.*

There is no one-size-fits-all approach to legacy giving. The best plan is the one that honors your priorities, reflects your financial situation, and creates the kind of impact you want to make in the world.

Here are some of the most common ways people choose to leave a legacy through Skaggs Foundation:



Bequest in a Will or Trust

Name Skaggs Foundation as a beneficiary of a specific amount, a percentage of your estate, or the remainder after other distributions.



IRA or Retirement Plan Beneficiary

Designate Skaggs Foundation to receive all or part of your retirement account—often a tax-efficient option for charitable giving.



Life Insurance Policy

Name Skaggs Foundation as a beneficiary of an existing life insurance policy, or consider donating a policy you no longer need to create a lasting legacy of impact.



Donor-Advised Fund (DAF)

You can recommend that any remaining balance in your DAF be granted to Skaggs Foundation after your lifetime.



Gifts of Real Estate or Appreciated Assets

In certain cases, non-cash assets like property or stocks may be gifted to support Skaggs Foundation's mission—offering possible tax advantages and lasting impact.

Benefits of LEGACY GIVING

Legacy giving not only helps strengthen your community—it also brings meaningful benefits to you and your loved ones. Here are just a few reasons why this kind of giving is so impactful:



*Cedarcreek Volunteer Fire Protect District:
AED Equipment*

You leave a legacy rooted in your values

Your support lives on through programs that improve health and wellness in Stone and Taney counties.



Charis-Group: Transportation Access

You can support the causes that matter most

Whether you direct your gift to a specific program or allow Skaggs Foundation to use it where it's needed most, your contribution will make a difference.



Reeds Spring Schools: Disc Golf

You may receive significant tax advantages

Many types of legacy gifts can reduce estate taxes or income taxes—especially gifts from retirement accounts or appreciated assets.



*City of Kimberling City Police Department:
AED Equipment*

You preserve your current financial flexibility

Most legacy gifts don't require you to give now. You can make a plan today that provides peace of mind and future impact.



My Neighbor's Charitable Pharmacy: Staff

You inspire others to give

Your legacy can be a powerful example to your family, friends, and community.

PLANNING TOOLS

That Support Your Legacy

Legacy giving works best when it's built into a well-rounded estate plan. This section outlines both the core documents that form your planning foundation and the options available to structure your future gift.



Healthcare Scholarship Recipients

Will or Living Trust

This is where your legacy begins. A will or trust outlines how your assets should be distributed and gives you the opportunity to include charitable gifts, like one to Skaggs Foundation. A trust may also help avoid probate and allow for more control over how your legacy is carried out.

Durable Power of Attorney

This document gives someone you trust the authority to make financial or legal decisions on your behalf if you ever become unable to do so. It ensures your affairs are managed smoothly and in line with your wishes.

Healthcare Power of Attorney

This document allows you to designate someone you trust to make healthcare decisions for you if you become incapacitated and unable to make those decisions on your own. It may be one of the most critical because it directly affects you and possibly your future quality of life.

Healthcare Directive (Living Will)

A healthcare directive shares your preferences for medical care if you're unable to speak for yourself. It can offer peace of mind to your family while ensuring your values are honored in moments that matter most.

Core Estate PLANNING DOCUMENTS

GIVING OPTIONS

With the help of your advisors, you may be able to utilize some of these common financial tools and strategies to structure a legacy gift.

Bequest (via Will or Trust)

One of the simplest and most flexible ways to leave a legacy gift. You can designate a specific amount, a percentage of your estate, or the remainder after other distributions.

Including Us in Your Will or Trust

If you're working with an attorney, you can use this sample language:

"I give [specific dollar amount, percentage of my estate, or description of property] to Skaggs Foundation, a nonprofit organization located at 101 Skaggs Road, Suite 404, Branson, Missouri 65616, Tax ID 300107007, to be used in support of its mission."

Naming Skaggs Foundation as a Beneficiary

On your retirement account, life insurance policy, or donor-advised fund, simply list:

- Legal Name: Skaggs Foundation
- Address: 101 Skaggs Road, Suite 404, Branson, MO 65616
- Phone: 417-348-8002
- Email: foundation@skaggs.net
- Federal Tax ID: 300107007

IRA or Retirement Account

Naming Skaggs Foundation as a beneficiary of your IRA or 401(k) can reduce taxable income and fulfill required distributions while supporting a cause you care about.

Life Insurance Policy

You may designate Skaggs Foundation as a beneficiary of an existing policy, or purchase a new one to create a significant future gift with a relatively small present-day investment.

Donor-Advised Fund (DAF)

DAFs offer a strategic way to give during your lifetime and leave a legacy by naming Skaggs Foundation to receive any remaining balance after your lifetime.



Simmering Center: Respite Care

Real Estate or Appreciated Assets

Gifting property or stocks may allow you to avoid capital gains taxes and take a charitable deduction—while making a significant impact without affecting your current cash flow.

Next Steps for Your PLANNED GIVING

Creating a legacy is a personal and meaningful journey. Whether you're still exploring your options or ready to finalize your plans, these next steps will help guide the process with confidence and clarity:



Cox Cardiopulmonary: Patient Scholarships



Water Bottles for Every Public School

Reflect on your values

Think about the people, causes, and communities you want to uplift through your legacy. Your giving should be a reflection of what matters most to you.

Talk with your loved ones

Having open conversations with family members or trusted individuals helps ensure your intentions are understood and respected.

Meet with your advisors

Work with your attorney, accountant, or financial advisor to formalize your plans. This guide can support your discussions and document preparation.

Include Skaggs Foundation in your plan

Whether it's a bequest in your will or naming us as a beneficiary on an account, your gift will support a healthier future for Stone and Taney counties.

Share your plans with us

Letting us know about your gift allows us to steward your legacy with care, gratitude, and intention. It also ensures your wishes are honored exactly as you intend.



*Taneyville School District:
Missouri Science Olympiad*

Ensure your wishes are honored exactly as you intend.

How to MAKE A GIFT TO SKAGGS FOUNDATION IN YOUR ESTATE PLAN



2024 Skaggs Legacy Endowment Grant Recipients

Naming Skaggs Foundation in your estate plan is a powerful way to continue your impact for generations to come—and it's easier than you might think.

Note: If you've included Skaggs Foundation in your estate plan, we'd be grateful to know. Sharing your intent helps us steward your wishes and recognize your generosity. Contact foundation@skaggs.net or 101 Skaggs Road, Suite 404, Branson, MO 65616.

Thank you for your generosity.



Skaggs Foundation Named 2025 Nonprofit of the Year



2024: \$10M+ Awarded to the Community Since 2013

let's get in touch

Skaggs Foundation
101 Skaggs Rd. Ste. 404
Branson, MO 65616
skaggsfoundation.org
foundation@skaggs.net