

# PAOLI PAOLI



#### **FALL 2021**

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#### **EDITOR**

Jennifer Drass

#### **CONTRIBUTING WRITERS** AND EDITORIAL SUPPORT

Pam Costanzi Noelle Fabrizio Pam Magidson

#### DESIGN

Merz Branding

#### **PHOTOGRAPHY**

Ed Cunicelli

#### PAOLI HOSPITAL **DEVELOPMENT TEAM**

#### Meghan Sayer

Executive Director of Development

#### Pam Costanzi

Director of Development

#### Jennifer Drass

Development Manager

#### Noelle Fabrizio

**Development Representative** 

#### PAOLI HOSPITAL FOUNDATION

255 West Lancaster Avenue Paoli PA 19301 Phone: 484.565.1385 mainlinehealth.org/phgiving

If you prefer not to receive fundraising communication from Paoli Hospital, please go to mainlinehealth.org/optout.

### QUICK 2,333

gifts received from grateful patients, employees, physicians, and friends of

Paoli Hospital.

\$3,426,371 29

raised in charitable gifts including outright gifts, multi-year commitments, and deferred gifts.

gifts received in support of the Interventional Vascular Suite—the capital campaign to advance heart and brain health at Paoli Hospital.

A quick look back at highlights from fiscal year 2021

2 PAOLI PARTNERS

## thanks

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Grateful patient Paula Rhoads (center) with caregivers Kellyanne Pot and Calvin McNeill

ON DECEMBER 14TH I WAS A PATIENT for the first time at Paoli Hospital. Dr. Scott Kripke performed a challenging surgery and I stayed eight days. During this trying time, there were two people who managed most of my care. Kellyanne Pot and Calvin McNeill. Having been hospitalized for months at a time in other hospitals, I will tell you I have never received finer nor more caring attention than from these wonderful people.

Kellyanne is simply the most efficient professional I have ever encountered. Her knowledge and ability to never miss any detail was beyond reassuring, both to me and my family who called daily. She is simply the absolute best nurse I have ever encountered.

If ever there was a kinder, gentler, more compassionate man than Calvin, I have never met him. His constant smile and wonderful care always left me feeling blessed and happier each time he entered my room.

These two individuals are simply extraordinary assets to the hospital and medical profession. I cannot tell you how their care impacted my recovery and I will never forget them.

My lasting impression of this hospital and its employees are excellent. Thanks to Paoli Hospital for hiring them, and to the wonderful staff for everything.

#### SINCERELY,

### Paula Rhoads





#### Introducing

#### **BOB AND NIKKI DAVIS**

General Maintenance Mechanic Labor and Delivery Nurse

#### SARAH, SCOTT, AND CHRISTINE MACON

Diet Clerk

Public Safety Officer Registration and Scheduling Specialist

#### WAYNE MCKNIGHT **AND TRISH KNIGHT**

General Maintenance Mechanic Material Handler

Q. At Main Line Health, our employees take pride in the environment of collaboration, participation, and respect. For some staff, this commitment to fostering a "work family" has a double meaning. We asked three families who work together at Paoli Hospital: What does it means to be part of the Paoli family?

#### A. Bob and Nikki Davis

Nikki Davis, a labor and delivery nurse, came to Paoli in 1995 just as the Hospital re-opened its maternity unit. When it was time for Nikki and her husband Bob to start their own family, there was nowhere they'd rather be than Paoli Hospital. She delivered both their sons (now ages 14 and 16) at the Hattersley Family Centered Maternity Unit. Like many parents with young children, Bob and Nikki found themselves juggling work-life balance. Nikki explains, "Bob was traveling a lot for work before kids. It wasn't sustainable for our family, so he stayed home with our oldest, and then a job opportunity opened up in public safety at the hospital." That was 13 years ago. Bob has since taken on various roles in Facility Management, including carpentry, and now he works as a mechanic. Over the years, Bob and Nikki's dedication to their "work family" has never waned and working through the pandemic reaffirmed their commitment. Bob shares, "we recognize that some of our colleagues couldn't be here during the peak of the pandemic, but our situation allowed us to still come into the hospital. I felt like it was our duty to be here and have one another's back during this past year."







#### A. Sarah, Scott, and Christine Macon

Chrissy Macon grew up across the street from Paoli Hospital. Her grandmother worked there and as soon as Chrissy and her siblings were old enough, they joined her. "My sisters Terrie and Karen were both already working at the hospital when I started as a candy striper in 1983. Within a few years, I met my husband Scott-he was working in the kitchen at the time," Chrissy recalls. Fast forward nearly forty years, and Chrissy and Scott have both grown their careers here. Scott worked in maintenance for many years and now works in public safety. Chrissy works in patient registration and their daughter Sarah, works alongside her cousins in the kitchen. The Macons agree that working at Paoli Hospital feels like an extended family with a shared purpose. Chrissy explains, "I like working in patient registration because I know I am making a tough time a little bit easier. Patients will remember me—especially those in the Holloway Breast Health Center. It feels good to be a familiar face for them during a stressful time." Scott shares Chrissy's sentiment. "Over the past 18 months, COVID has changed the way we operate. But people still have to come to the hospital. I was grateful that my family and I were able to keep working and I did my part to help our patients feel safe during a difficult time."

#### A. Wayne McKnight and Trish Knight

Growing up in Bryn Mawr, Trish and Wayne have deep ties to the Main Line community. Both followed in their mother's footsteps to work at Paoli Hospital—Trish in materials management and Wayne in maintenance. Trish shares, "I started at Paoli working night shift when my kids were little and now I have grandkids. I remember when we re-opened the maternity unit and built the pavilion. There have been a lot of changes, but Main Line Health has always been a great employer. After all these years, I still enjoy coming to work." Wavne adds, "I am always learning something new here and I love working with my hands—especially if it means helping patients. It might be something as simple as fixing a call bell, but if it makes their stay more comfortable, I feel a sense of accomplishment." Reflecting over the past year, Trish shares that she felt encouraged by the teamwork. "Materials management has never been as closely examined as we were during the pandemic. We distribute everything from needles and tubes to band-aids and PPE. While it was a stressful time, especially in the early days of COVID-19, I always felt supported and encouraged."

## eadline



ONAVERAGE, NEARLY 4,000 PEOPLE in our community die each year from heart disease and stroke. Both heart disease and stroke are diseases of the vascular system with multiple shared risk factors, including smoking, high blood pressure, high cholesterol, and diabetes. While fewer will die from stroke than heart disease, the Centers for Disease Control reports that the number of people dying from stroke is increasing in 20 states, including Pennsylvania. Nationally and locally, stroke is the leading cause of disability and can result in paralysis or problems controlling movement, sensory disturbances including pain, problems using or understanding language, and problems with thinking and memory.

The opening of Paoli Hospital's new Interventional Vascular Suite in early 2022 marks the dawn of a new era demonstrating the hospital's ability to deliver the latest care for patients experiencing stroke and heart disease. With this program, critical investments are being made to deliver mechanical thrombectomy and structural heart procedures, as well as more complex heart and brain surgeries.

To date the hospital has received \$5,267,283 in charitable gifts to support the new Interventional Vascular Suite. Meghan Sayer, Executive Director of the Paoli Hospital Foundation, explains, "When the Main Line Health Board approved the project, we knew it would be a large investment. But we also knew we could count on our community. This program clearly resonates with so many of our patients and we are grateful for all the donors who have stepped forward with their support."

Jim and Jane Davidson were the first to make a major gift to support the Interventional Vascular Suite and launch the fundraising campaign. After learning about the advanced imaging technology used to deliver stroke interventions, the Davidsons were inspired to bring this level of care to their community hospital. As Jane explains: "Jim's mother suffered severe damage from a stroke, and we hope to save other families from such an experience."



Jim and Jane Davidson

arlier this year, construction began on the new suite in existing shelled space on the second floor of the hospital. The suite will include a total of five labs to support neurointerventional, cardiac catheterization, and electrophysiology procedures.

This expansion is part of Paoli Hospital's journey toward advanced stroke care that aligns with Main Line Health's commitment to growing services in the neurosciences. With a focus on expanding subspeciality expertise in neurology, neurosurgery, neurointervention, and pain management, Main Line Health is building a team of hospital-based neurologists for inpatient care; actively recruiting fellowship trained providers; and partnering with Jefferson Health System to provide functional neurosurgery and advanced spine, cranial, tumor, vascular, stroke and trauma care.



**Greg and Caroline Bentley** 

#### A HISTORY OF CARE. LOOKING TO THE FUTURE.

Greg and Caroline Bentley have, for a long time, considered Paoli Hospital their hospital. Other than when their children were born at Lankenau, they have received almost all their care at Paoli Hospital.

Caroline recalls emergency care her daughter received as a child and a life-saving visit she herself had in 2017. Suffering from a rare, hard-to-diagnose disorder, she is grateful that the persistence and knowledge of the emergency room staff led to the right specialist being called in to help her recover.

During recent hospital stays, both Caroline and Greg experienced the distinctive community feel of Paoli, where they know staff and volunteers and are always treated with cheerfulness and a high degree of medical expertise. Caroline appreciates that staff always take time to answer questions about her care. Greg compares the resources at Paoli to those of a large urban teaching hospital and loves having them here in Chester County. He appreciates how Paoli Hospital is part of Main Line Health and enjoys the benefits of a large healthcare system, while remaining warm and friendly.

Therefore, when the Bentleys learned that Paoli was adding an advanced stroke care program, they were eager to help. Greg admires Main Line Health for making the investment to support advanced stroke care in Paoli Hospital's service area. He explains, "both of our mothers suffered strokes, and the thought that Caroline and I could support this new intervention just felt like the right thing for us to do."

Greg and Caroline are pleased they were able to make a \$1 million commitment to name the new Neurointerventional Unit after their mothers-Arlene Bentley and Genevieve Stackwicz. But, as Caroline chimes in, what is significant cannot be measured in dollars. All gifts to this project are important, and Greg and Caroline hope their story will inspire others to support this new, life-saving technology.



Dr. Sumeet Multani

Vascular neurologist Dr. Sumeet Multani recently joined Main Line Health and will serve as the site director for neurointerventional services at Paoli Hospital. "I couldn't be more excited to be here at Main Line Health to build this program at Paoli Hospital." Dr. Multani explains, "The new neurointerventional program at Paoli will allow us to keep increasingly complex stroke patients right here, close to home. Quick local access to these services could significantly reduce disability, because during a stroke, millions of brain cells die every minute care is delayed."

For Greg and Caroline Bentley, the devasting impact of stroke is personal. Both their mothers suffered life-ending strokes, so the idea that they could support this new initiative and save other families from a similar experience resonated deeply with them. Greg and Caroline are proud they were able to make a \$1 million commitment to name the new neurointerventional unit after their mothers-Arlene Bentley and Genevieve Stackwicz.

Greg shares, "our support is a way to remember our mothers while also paying tribute to the tremendous dedication of the Paoli Hospital physicians and staff." Greg is the CEO of Bentley Systems, the company Greg joined with his four brothers in 1991. He explains, "Bentley Systems provides modeling and project management capabilities to support the design, construction, and operations of major infrastructure developments as well as campuses, buildings, and projects like this Interventional Vascular Suite."

As an engineer and a businessperson, Greg appreciates the prudent management and efficiencies of this project, such as using the space reserved 11 years ago on the second floor of the Pavilion for just such a future need. He and Caroline also recognize how thorough planning led to combining the construction of the Neurointerventional Unit with upgrading and relocating the Cardiac Catheterization Lab.

Jim Paradis, President of Paoli Hospital, explains, "the inclusion of neurovascular interventional capabilities within the cardiac catheterization lab setting helps to optimize resources, increase staff efficiency, and streamline operations. The steps necessary to offer comprehensive, neurointerventional treatments are very similar in process to those followed by cardiac programs. Both are based on the need for rapid triage and assessment, as well as aggressive intervention within a very limited time frame."

The investment in equipment that supports both cardiac and neurointerventions simultaneously eliminates the additional cost of duplicative equipment and facilities. While both programs will have specific requirements from the Joint Commission pertaining to their certification as an Accredited Chest Pain Center and Comprehensive Stroke Center, the requirements from one program can enhance another.

The Joint Commission accredits hospitals based on a number of key quality indicators, including organizational standards related to providing high-quality, safe, patient-centered care. Paoli Hospital, along with each of Main Line Health's acute care hospitals, has been recognized by The Joint Commission with the Gold Seal of Approval for patient care and services.

Main Line Health's acute care hospitals are also the recipients of the 2020 American Heart Association



Lillian and John Neff

#### **NEFF FAMILY LEGACY**

Lilli and John Neff were private people. They demonstrated a strong work ethic and were proud of their humble beginnings. John enjoyed tremendous success as a fund manager at The Vanguard Group. They were also very generous and believed passionately in giving back. After John died in 2019, it soon became apparent that he had left transformational gifts to an astounding 13 charities! Paoli Hospital was one of those grateful beneficiaries named in John's will, because of the skilled, compassionate cardiac care Lilli had received before she succumbed to heart disease in 2017.

The Neffs also passed on their philanthropic spirit to their children, Lisa Neff-Ryave and Stephen Neff. When Lisa, who serves as the executrix of her father's estate, learned that Paoli Hospital was upgrading the interventional cardiac care provided at Paoli, she spoke to her brother and they agreed they would add to the gift from their father's estate to provide \$1 million to name the new unit as the "Lillian and John Neff & Family Cardiac Care Unit." Clearly, this blended estate and outright gift came about through incredible acts of generosity that will have a transformational impact on this important project.

Lisa, who had a cardiac scare of her own in 2018 and was treated in Paoli's Cardiac Catheterization Lab, understands just how important the upgrades to the new unit will be. Additionally, Lisa is so dedicated to the mission of Paoli Hospital that she joined the Foundation's Board of Trustees. She has committed to healthy eating and a dedicated exercise routine to reduce her health risks. She and Stephen are both proud to honor their parents' legacy by naming this new unit in their memory.



Mission: Lifeline\* and American Stroke Association Get with the Guidelines\*–Stroke quality achievement awards. Each hospital independently received these recognitions by implementing specific quality improvement measures for the treatment of patients who suffer severe heart attacks and stroke.

Lisa Neff Ryave, Paoli Hospital Foundation Trustee, recognizes that the Interventional Vascular Suite will not only deliver the latest cardiac care, but also help to attract and retain highly skilled physicians, nurses and technicians. Lisa, who had a cardiac scare of her own in 2018, reflects on the care she received first in Paoli's Emergency Department and then the hospital's Cardiac Catheterization Lab, "My mother died of cardiac disease in 2017, so I was very aware of my own risk. I visited my primary care physician, Dr. Lanza, when I was experiencing what seemed like heartburn and reflux symptoms. He sent me right to the Emergency Department, only steps from his office. There they discovered I had a blockage and got me immediately to the Cardiac Catheterization Lab. The care was top-notch and I will be forever grateful to everyone at Paoli Hospital."

In 2019, Lisa joined the Paoli Hospital Foundation Board. She recalls, "I was impressed by the fundraising efforts that were geared to covering more than 20 percent of the costs of the Interventional Vascular Suite through charitable donations. It was clear to me, from my own experience, as well as my family's, that these advancements would elevate care throughout the entire hospital for generations to come. So, it was an honor to carry on my parents' legacy through my service as a Board member and my family's charitable commitments to the new Cardiac Unit."





## spotlight

hen **KENDALL KEMM** was just 10 years old. she had a stroke caused by an arteriovenous malformation (AVM) that had ruptured in her brain. She was hospitalized for 12 days following her stroke

and left with limpness in her left leg as well as a terrifying diagnosis-an 8cm AVM deep in her brain.

AVMs are a tangle of unusual blood vessels that connect to arteries and veins and disrupt the blood flow. This results in increased pressure on the surrounding veins and arteries. Over time, this pressure can result in spontaneous rupture or stroke. While AVMs can occur in any part of the body,

they most often happen in the brain and spine.



KENDALL KEMM

Kendall's mom Leslie Gudel quickly devoured the latest AVM research and networked with families across the country to understand her daughter's options. Treatment for AVM can involve placing a catheter inside the blood vessels and blocking off the abnormal vessels with various materials, such as glue or coils. However, the location of Kendall's AVM is deep within the brain, so radiation was determined as the best treatment option.

"AVM treatment involves a tremendous amount of risk-benefit analysis and faith," explains Leslie. "What I've learned is that there is still a lot to learn about AVMs and the broader world of neurosciences. I am proud that Main Line Health and Paoli Hospital are making important investments to advance the care in this specialty."

While the fear of another stroke is real, Kendall remains positive with the help of a strong network of supporters including Becky Carr, Kendall's childhood nanny turned occupational therapist. Leslie shares, "After the radiation treatment in 2015, Kendall lost the use of her left hand. It affected her mentally too—she lost a lot of her confidence. That's why we are so grateful for Becky—she can push Kendall without overpowering her. They have a special bond. Kendall trusts Becky and has made tremendous progress under Becky's care at Bryn Mawr Rehab."

Kendall also finds support through connecting with others in the AVM community. To learn more about her experience with AVM and Kendall's Crusade, visit kendallscrusade.org.

### MAIN LINE ahead

### Bringing Innovation and





#### Main Line Health King of Prussia Offers a Unique Patient Experience

n March 9, 2020, we proudly opened the doors to Main Line Health King of Prussia, our sixth and most distinctive health center. There was much to celebrate. But any fanfare would have to wait. Later that week, our lives would be forever changed by an unimaginable pandemic that captured our collective consciousness. Our focus at Main Line Health shifted completely to COVID-19 response efforts.

Nearly one year later, on February 25, 2021, more than 200 of our friends and supporters joined us for a virtual tour showcasing the unique services offered in this state-of-the-art health care destination. Then and now, there is still so much to celebrate.

"Main Line Health King of Prussia represents a new approach to health care," said Jack Lynch, president and CEO of Main Line Health. "In planning this facility, our goal was to provide an exceptional experience that encapsulates holistic wellness-notably the distinct

preventative, diagnostic, and treatment needs of each individual patient, especially women. It is a concept that's been years in the making, and a shining example of our commitment to patient health in its entirety."

Located in the Village at Valley Forge, Main Line Health King of Prussia offers primary care, more than 25 medical specialties, lab and imaging services, rehabilitation services, a robust calendar of community events, and exceptional amenities. Specialists include integrative and functional medicine service providers, who search for connections between a patient's medical history and their lifestyle to determine the root cause of ailments. These experts view patients through a holistic lens to help them achieve optimal health.

In addition, our newest site serves as home to the Women's Specialty Center, developed in partnership with Axia Women's Health and aimed at delivering the complete spectrum of physical, emotional, and wellness

## Accessibility to Health Care

needs for women-all under one roof. The center offers coordinated, customized care including breast health, reproductive health, headache care, heart care, maternity care, vein care, weight management, and much more. Amenities abound, including the Wellness Porch—a meticulously curated shop featuring an assortment of products recommended by our physicians. Displayed at the shop's entrance is a tapestry created with pieces of fabric contributed by our employees and patients. This "Fabric of Our Community" is a one-of-akind art installation.

King of Prussia also presented a natural fit when we sought a second location for our expanding Women's Emotional Wellness Center (WEWC). Already part of our Newtown Square health center, the WEWC provides comprehensive behavioral health services for women experiencing depression, anxiety, and other concerns. The new King of Prussia location includes one of the only mental health partial hospitalization programs in the country exclusively for women. We are especially grateful to the Paoli Hospital Women's Auxiliary for its support of the WEWC.

Perhaps the most unique facet of Main Line Health King of Prussia is the Rooftop Farm. This 6,500-squarefoot space, set in motion by a generous commitment from Aramark, will serve as a therapeutic, educational, and nutritional hub for our patients and the entire community. Visitors are already learning how to take charge of their nutrition through our Guest Chef series, as well as popup demonstrations occurring throughout the facility.

Notably, through partnerships with local municipalities, nonprofit organizations, colleges, and universities, we will be able to help meet the challenges of food insecurity. The fresh produce grown on our Rooftop Farm will be given to community members in need.

"Main Line Health is about people—those we serve and those who serve others," said Lynch. "Everything about Main Line Health King of Prussia has been designed with a focus on the patient today and the health of our community in the future. We're proud to provide the exceptional compassion and expert care we're known for in this extraordinary space."

In fact, the facility itself has been recognized by the International Interior Design Association of Pennsylvania, New Jersey, and Delaware with its Best of Healthcare Design Award. Jurors "celebrated the atmosphere created in the space, with many unique elements that transport you out of a medical facility and into a hospitality environment."

"What we hope patients will feel the moment they walk into the building is the healing environment," said Donna Phillips, president of Bryn Mawr Rehab Hospital and senior executive of Ambulatory and Professional Services for Main Line Health. Phillips led the project and continues to serve as point person for the new facility.



"This beautiful health center offers a safe and calming place, filled with the expertise to address every medical need in the community," continued Phillips. "Too often, health care is episodic, and focuses only on a particular illness. By providing a coordinated approach to primary and specialty care, we're able to focus on the full continuum of a patient's health. There is so much to be gained when the health and wellness journey is a collaborative partnership. Main Line Health King of Prussia is the manifestation of what community health care can and should be."

Because of your continued generosity, we are proudly leading the way in providing accessible health care for our community. There are many naming and sponsorship opportunities still available at Main Line Health King of Prussia. To learn how you can help make a difference, please contact Karrie Borgelt, senior vice president of development, at

borgeltk@mlhs.org or 484.580.4144.

## bold face



#### SUPPORT THE LEGACY BRICKS CAMPAIGN

Bricks have always been a symbol of strength, foundation, and connection to one another supporting the whole. You can be a part of the permanent brick terrace at Paoli Hospital by purchasing a brick to acknowledge appreciation for Paoli Hospital, celebrate family, honor a veteran, remember a loved one or thank a favorite healthcare professional. Bricks can be customized with your own message and range from \$200-\$1,000.

#### **CELEBRATE THE ROARING** TWENTIES-SAVE THE DATE!

Join the Paoli Hospital Auxiliary in honoring Main Line Health President and CEO Jack Lynch at a Roaring Twenties Gala. This event, chaired by Paoli Hospital Foundation Board Chair Patty Holloway, promises to be a fantastic opportunity to support the hospital and recognize our local healthcare heroes.

This dedicated group of volunteers welcomes your support and participation! For more information about the Auxiliary or these events visit: paoliauxiliary.org.





#### **CHARITABLE GIFTS FUND OPERATING ROOM UPGRADES**

Thanks to the generous support of Paoli Hospital donors, all 12 of our operating rooms were equipped with a new video integration system this past year. The upgraded

system features higher resolution images, voice activated controls, and enables live streaming to deliver virtual educational programming for OR staff. A total of \$327,000 was donated to support this new equipment. Special thanks to the following donors: Mr. and Mrs. Frank J. Brewer, Mr. and Mrs. Richard E. Devine, Jr., The John and Shirley Nash Foundation, Mr. and Mrs. Stephen J. Negrotti, Mr. and Mrs.

Thomas J. Wynne, and Mr. and Mrs. Alejandro Zozaya

#### **MAIN LINE HEALTH-JEFFERSON NEUROSURGERY WELCOMES NEW PHYSICIANS**

Sumeet S. Multani, MD and Thana Theofanis, MD recently joined the Paoli Hospital medical staff. Dr. Multani is a vascular neurologist and serves as site lead for the Neurointerventional Program at Paoli. Dr. Theofanis is a neurosurgeon who specializes in endovascular neurosurgery.



## back story

n September 21, 1991, the new Cancer Center at Paoli Hospital opened to serve the surrounding community. What had begun as a recommendation in the hospital's 1982 long-range plan to enhance and expand the radiology program went on to become a full-service cancer treatment center administering more than 5,000 radiation treatments and 3,000 chemotherapy treatments in its first year.

Four years earlier, at Paoli's Board of Directors meeting in April 1987, Stephen Fox, MD, FACP, had presented the concept of Paoli entering into an affiliation agreement with Fox Chase Cancer Center. A Paoli Hospital internist and oncologist, Dr. Fox was also on staff at Fox Chase, and had been working on strengthening the relationship between the two. The proposal, which included constructing a new building on the Paoli campus for radiation therapy, chemotherapy and support services, was unanimously approved by the Board and following extensive negotiations with Fox Chase, was also approved by Main Line Health.

Paoli Hospital Foundation trustee Betty Moran and Vice Chairman of the Hospital Board Bud Fretz co-chaired the fundraising campaign for the new project, which was a huge success. The campaign raised \$5,079,000 toward the \$10 million cost of the Cancer Center, surpassing its goal of \$4.2 million. In an extraordinary show of generosity, the Paoli Hospital Auxiliary pledged \$1.5 million toward the campaign and later added an additional half-million dollars to its pledge.



Thirty years later, the mission of the Cancer Center of Paoli Hospital remains the same—to provide the most comprehensive therapies available to improve our cancer patients' quality of life. Philanthropic support of the Cancer Center is what enables us to continue this dedication to our patients. Grateful patient donors like Julie and the late Hal Hyatt help to ensure that our community has access to the latest treatments close to home. "Hal made the decision to designate a portion of his IRA to the Paoli Hospital Cancer Center because the nurses and staff there were so compassionate and caring. They made a difficult time more manageable, and I'll always be grateful for that," shares Julie.

To commemorate the 30th anniversary of the Cancer Center at Paoli Hospital with a charitable gift, visit:

mainlinehealth.org/phgiving.



255 West Lancaster Avenue Paoli, PA 19301

mainlinehealth.org/phgiving 484.565.1385

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Three simple ways to plan a deferred gift to Paoli Hospital and join the Paoli Society!

Undistributed assets in qualified retirement plans can be subject to income tax when left to heirs other than a surviving spouse. You may choose to designate all or a portion of these assets to charity and leave other assets to heirs.

### GIFT OF BANK

or IRA beneficiary designation form, a Payable on Death (POD) designation, available at many banks, gives you the option to select a beneficiary of the account upon your death.

Much like a retirement account Placing a Transfer on Death (TOD) designation on your brokerage or investment account allows you to allocate the account to charity-either as a partial or full beneficiary after your lifetime. To learn more about this and other creative ways of giving, visit paoli.plannedgiving.org.