

GIVING MATTERS

WINTER 2023

Queen of the Valley
Foundation
with  Providence



THE RIGHT THING,
IN THE RIGHT WAY,
FOR THE RIGHT REASONS

Barbara Gabel and Zach Zachowski live out
their life motto through a gift to the Queen



*Jeff Streblow, Chair, Board of Directors,
and Rachael Poer, President/CEO*

TO OUR LOYAL SUPPORTERS

Honoring and celebrating our donors and community is truly the best part of our work for Queen of the Valley Foundation, and we are so proud to share stories of the thoughtful, strategic and forward-thinking people who help to strengthen our medical center and community with their generosity.

In this issue, you'll learn about Barbara Gabel and Zach Zachowski, whose gift to the emergency department extends their personal motto to "do the right thing, in the right way, for the right reasons." And we share the story of Bruce Troup, M.D., Ph.D., whose gift of real estate to the Queen will benefit the radiology department, where he has worked for nearly 40 years.

We also invite you to share in the magic and joy of this year's Generous Heart Gala, held September 23 at the Culinary Institute of America (CIA) at Copia in Napa. Photos from the event go a long way in illustrating the energy and

exuberance of the evening. It was such a special night, and we thank our donors, sponsors and guests for joining in the celebration.

Amid these inspiring reports of the great future our donors are creating for the Queen, we welcome our new board chair, Jeff Streblow, a fourth generation Napa native and a third generation Queen of the Valley Foundation board member. Jeff's grounding in our community coupled with his business acumen will surely continue to steer us ever closer to reaching our vision of health for a better world.

We thank you for your unwavering support.

Sincerely,



Rachael Poer
President/CEO

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WITH PROVIDENCE

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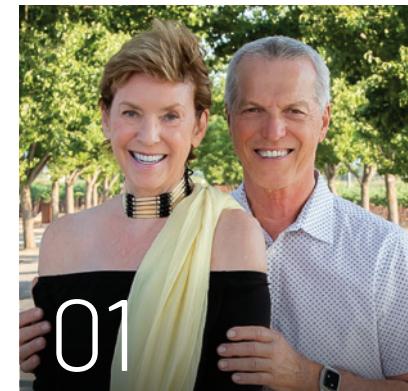
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COVER STORY

The Right Thing, in the Right Way,
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Barbara Gabel and Zach Zachowski

THE RIGHT THING, IN THE RIGHT WAY, FOR THE RIGHT REASONS

Barbara Gabel and Zach Zachowski live out their life motto through a gift to the Queen

Zach Zachowski and Barbara Gabel were born in Wisconsin and met in Milwaukee in 1975. After traveling the world they decided to start a business in California in 1983. They followed this motto: do the right thing, in the right way, for the right reason. That small business, Zachary's Pizza, grew to five East Bay locations and became 100% employee owned in 2010, which helped facilitate Zach and Barbara's retirement and subsequent move to Napa Valley.

The couple's motto has expanded to their philosophy of life, leading them to make a gift in

support of Providence Queen of the Valley Medical Center's emergency department, which serves 30,000 patients annually and is the only trauma center in Napa County.

"In this case, we found there was one more 'right' – do it at the right time – and this gift to the Queen is the final piece of the puzzle for us," Zach said. "The timing was perfect for that."

In recognition of their contribution, their names will be added to the cardiac resuscitation bay in the

emergency department at Providence Queen of the Valley Medical Center. They, along with other donors who have given to the same project, have helped to cover 100% of the expense of refreshing all the rooms and upgrading technologies for patient care, while maintaining a Bronze Geriatric Emergency Department Accreditation certification for Napa's aging population.

Since retirement, they have settled into living among the vineyards in Napa Valley, and they built their home on 10 acres planted with chardonnay and sauvignon blanc grapes. But despite living in this idyllic setting, Zach and Barbara are always aware of how important Providence Queen of the Valley Medical Center is for the community.

"We live near the Queen, and we can hear emergency helicopters fly right over our home," Barbara said. "I always stop for a moment and send my thoughts out to the patient and family being transported, knowing that this was not how they had planned their day would go."

But it's not just the patients' lives that Zach and Barbara want to help. "It is most admirable how the staff are balancing their own lives and challenges, day after day, and yet they focus on what needs to be done in the moment," Barbara said. "The Queen grounds our community. We cannot imagine being without the hospital and all the services it provides, especially the trauma center."

Now that the couple is out of the pizza-making business, it has freed up Zach's days to tend to their vineyards. Although they were apprehensive at first, "now I wouldn't have it any other way," Zach said. "Being a local grower helps us connect with the community."

And while they visit Wisconsin every year, Zach and Barbara are grateful for these wine country roots, made complete with their two rescue dogs and nine chickens. "We often say that the Midwest is a great place to grow up, and Napa is a great place to grow old," Zach said. "As we all know, there is so much need everywhere, and it's hard to not be able to give every time one is asked. But we focus on making the best choices we can."



The Queen grounds our community. We cannot imagine being without the hospital and all the services it provides, especially the trauma center.

— Barbara Gabel

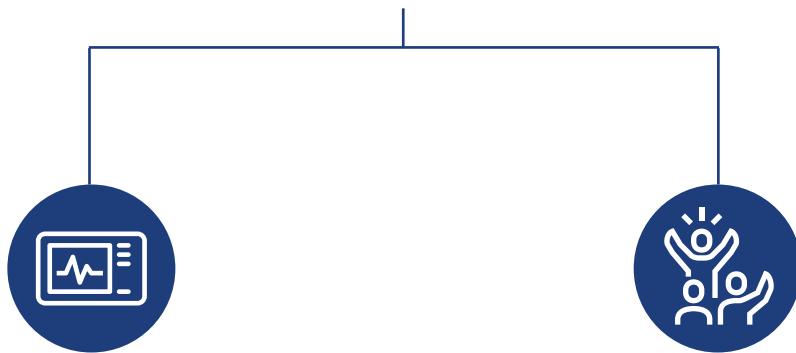


HOW YOUR GIFTS WERE INVESTED

\$2,135,951

transferred to

Providence Queen of the Valley Medical Center in 2022



\$1,969,951

for Capital Equipment

Items purchased:
heart lung perfusion machines,
fetal monitors, cardiac surgical
equipment, centralized telemetry
upgrades, ultrasound imaging system,
emergency preparedness tent,
orthopedic surgical table, and other
operating room equipment

\$166,000

for Programs and Services

Items funded:
the cancer wellness program, perinatal
education, behavioral health program,
emergency department, pediatric
education, a celebration for our nurses

Total Funds Raised in 2022

\$5,279,821



- Planned Giving \$2,187,935
- Major Gifts \$1,468,119
- Events \$721,796
- Annual Giving \$418,995
- Donor Clubs/Tributes/Memorials \$268,680
- Gifts In-Kind \$214,296

Total Philanthropic Impact in 2022

\$6,141,105



- \$5,279,821 (Production)
- \$861,284 (Prior Pledges and Planned Gifts)



Providing great care relies on attracting and retaining the best-qualified physicians and caregivers available. Your support, whether through a financial investment in the Queen, your gift of time, or by utilizing our medical services, allows for us to recruit a stellar medical team and place advanced technology in the hands of those who have a high level of expertise using it.

— Laureen Driscoll, chief executive
Providence South Division





Bruce Troup, M.D., Ph.D. with Damon Tinson, director of planned giving, Queen of the Valley Foundation

FINDING THE FOUNTAIN OF YOUTH

Bruce Troup, M.D., Ph.D., extends his legacy of philanthropy through a charitable gift annuity

Almost four decades ago, Bruce Troup, M.D., Ph.D., experienced what he calls “pure serendipity” when he accepted a position with The Radiology Medical Group of Napa at Providence Queen of the Valley Medical Center.

“This hospital and Napa Valley were ideal for me. Coming here was the best decision I’ve ever made,” he said.

And now Dr. Troup is repaying the generosity he has experienced by making a charitable gift annuity of his home to Providence Queen of the Valley Medical Center. This type of donation continues to become more popular for charitable individuals for a few big reasons: tax deductions, a lifetime income stream, and “the dopamine release when doing something good for the community,” Dr. Troup said.

Dr. Troup decided a while ago that he would be including Providence Queen of the Valley Medical Center

in his estate plan. “I have always been impressed with how the community and the foundation supported the hospital,” he said. “For a small hospital, it’s incredibly well-equipped overall – and particularly in radiology.” He credits Nancy Nicks, who was the foundation’s leader from 1986 to 1987 and started the foundation’s endowment, for helping to build the hospital into what it is today.

But it wasn’t until he had a conversation with foundation board member Bob Didier, D.D.S., about his own decision to move forward with a charitable gift annuity for remainder interest in a home that Dr. Troup realized how perfect this donation would be for him as well. “It was all pluses and zero minuses,” he said.

Queen of the Valley Foundation planned giving officer Damon Tinson explained that under this gift plan, the donor deeds the remainder interest in their home to the foundation. In exchange, the foundation then sets up a charitable gift annuity based upon the remainder value of the home and the donor’s age. The donor retains the right to live in their home for their lifetime, receives guaranteed fixed income payments for life, a portion of which is tax free, and benefits from a charitable income tax deduction.

“In the planned giving world, we often call this type of gift ‘the fountain of youth,’ because annuitants of the Queen are known to live long lives!” Damon joked. If you would like to learn more about a charitable gift annuity, please contact Damon Tinson by phone at 707-257-4144 or by email at Damon.Tinson@providence.org.

CONSIDERING A REVERSE MORTGAGE?

Explore this charitable alternative first

If you have paid off your mortgage or have considerable equity in your home but you need additional income, you may have considered a reverse mortgage. You may not be aware that there is another way to use the equity in your home to create income for you while making a meaningful gift for Providence Queen of the Valley Medical Center – all while continuing to live in or use your property for life.

How it works

This technique begins with a retained life estate gift – you place Providence Queen of the Valley Medical Center on the deed to your home, vacation home or farm but retain the right to occupy (and maintain) the property for life. We then set up a charitable gift annuity (CGA) based on the remainder value of the property. The CGA will pay you (and/or another beneficiary) a fixed annual income for life.

For example, let's say that Robert and Rita, both 75, own a \$750,000 home. To create income, they choose to make a retained life estate gift of their home with a CGA instead of using a reverse mortgage. Their guaranteed income payments will be partially tax-free, whereas reverse mortgage payments are not guaranteed and might be subject to additional costs. Robert and Rita receive an income tax deduction in the year of their gift (since they itemized and met other criteria), lock in a higher monthly payment when compared to what is available through a reverse mortgage, and enhance their charitable legacy.

Compelling advantages – for you *and* for us



Turn an existing asset into an income stream while remaining in your home.



Lock in today's high gift annuity rates.



Enjoy tax benefits because your gift likely qualifies for a charitable income tax deduction, and your CGA income payments are tax advantaged.



Make a lasting impact on the lives in your community by helping Providence Queen of the Valley Medical Center.

70½ or older? Don't forget about gift options from your IRA.

A tax-free qualified charitable distribution (QCD) from your IRA counts toward your required minimum distribution if one is due.

The traditional QCD lets you give up to \$100,000 (annual aggregate limit) directly from your IRA to Providence Queen of the Valley Medical Center.

The new QCD law lets you make a one-time distribution up to \$50,000 to fund a charitable gift annuity or charitable remainder trust (CRT), providing an income stream for you and/or your spouse. Spouses can combine their distributions into a single CRT or a joint-life CGA.

Help us **transform lives** and create health for a **better world**.

Please reach out for more information about creative ways to support Providence Queen of the Valley Medical Center. Contact Damon Tinnon, director of planned giving, by phone at 707-257-4144 or by email at Damon.Tinnon@providence.org.

A GATHERING OF EXCEPTIONAL WOMEN



Second annual Women for Wellness event awards support to nursing education and palliative care at the Queen

The Founders' Courtyard Garden at Providence Queen of the Valley Medical Center was overflowing with good cheer and generosity at the Women for Wellness signature event on May 18, 2023. At this second annual event, the group chose beneficiary programs to support, awarding \$100,000 to two crucial programs, Queen's nursing education and palliative care.

The luncheon guests heard from Jennifer Gosztyla-Borzoni, R.N., senior manager clinical education, and Michelle Neveu, nurse practitioner, palliative care, who shared their experiences working with patients and staff.

"On behalf of my co-chairs Kim Streblow and Myrna Andrews, I would like to extend our appreciation for this incredible group," Cindi Dwyer said. "This is such a special event, and it's an honor to be able to support the Queen in this way."

We would like to thank our amazing Women for Wellness group, especially Kim Streblow, Myrna Andrews and Cindi Dwyer for continuing to support medical care for all in Napa County and furthering our shared philanthropic vision to provide high-quality health care for all that live and work in Napa Valley.



Jennifer Gosztyla-Borzoni, senior manager clinical education, speaks to the Women for Wellness event guests.



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Truchard Vineyards

For more information or to join
Women for Wellness,
contact Christina Mitchell at
Christina.Mitchell3@providence.org.





200 guests enjoyed a beautiful autumn evening at the CIA at Copia in Napa.

ONE ENCHANTING EVENING

Providence Queen of the Valley Medical Center brings magic, music and merriment to CIA at Copia

Magic was in the air at this year's Generous Heart Gala, as 200 guests came together in celebration at the CIA at Copia.

Guests were ushered into the dazzling atmosphere by the music of DJ Rotten Robbie and enjoyed Napa Valley's finest wines and cuisine by the CIA. The alchemy of our celebratory community came to life as magician and comic Jay Alexander amazed the audience with his captivating blend of comedy, magic and mind reading. Guests danced and tried their luck at blackjack, roulette and other

casino games well into the night, delighted by the enchanting evening.

"Our Napa Valley community knows how to celebrate, so our goal was to create the best party in town – and we certainly delivered!" said Queen of the Valley Foundation board chair Jeff Streblow. "Our achievements this year were remarkable, and we were overjoyed to invite all of our friends, new acquaintances and loyal supporters to join in the festivities."

We invite you to save the date for next year's Generous Heart Gala,
Saturday, September 21, 2024.



We would like to share
a very special **thank you**
to our 2023 sponsors:

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SAVE THE DATE
WOMEN FOR WELLNESS

2024
Thursday, May 16