

## Our Mission

*The Midlands Chapter* provides education, information, and support to individuals afflicted with Alzheimer's disease and supports the National Alzheimer's Association in its research for the prevention, cure and treatment of Alzheimer's disease and related disorders.

*Our mission* is to eliminate Alzheimer's disease through the advancement of research, to provide and enhance care and support for all affected and to reduce the risk of dementia through the promotion of brain health.

*Our vision* is a world without Alzheimer's disease.

Founded in 1982, this Chapter is a member of the National Alzheimer's Disease and Related Disorders Association.

The Chapter is a 501c3 non-profit organization made up of volunteers, laypersons, and

healthcare professionals committed to working together to accomplish our mission.



Whenever referring to the Chapter in a legal document please be sure to refer to it as:

**Alzheimer's Disease and Related Disorders Association, Inc., - Midlands Chapter.**

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## Midlands Chapter

### Administrative Office

1941 South 42nd Street, Suite 205

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Council Bluffs, IA 51501

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**24/7 Contact Center: 1.800.272.3900**

**Here to help and offer hope.**

**All day. Every day.**

**Research • Care • Prevention**



**[www.alz.org/midlands](http://www.alz.org/midlands)**

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## Midlands Chapter



## Planned Giving

*"Gifts to Fund the Future"*

**[www.alz.org/midlands](http://www.alz.org/midlands)**

## What is planned giving?

Planned giving provides you with a way of making a lasting gift to the Alzheimer's Association Midlands Chapter and receiving a favorable tax consideration at the same time.

Planned giving covers three general circumstances:

- **An outright gift**, such as cash, stock, tangible property, and gifts of real estate where the Alzheimer's Association Midlands Chapter generally has use of the asset immediately.
- **A bequest**, where the donor retains the use of the asset during his/her lifetime and the Alzheimer's Association Midlands Chapter has the use of it after the donor's death.
- **A lifetime income gift**, where an asset is donated to the Alzheimer's Association Midlands Chapter during the donor's lifetime but the donor continues to receive income from the asset for life.

## Why should I consider a planned gift of hope?

A planned gift can help you with your estate planning. Planned giving can allow you an immediate reduction in income taxes and possible future reduction in estate taxes. It is an effective way to help yourself and the Alzheimer's Association Midlands Chapter with their mission to further research, education, family support, and advocacy.

*The Alzheimer's Association Midlands Chapter gave me the "insight, understanding and real help with my wife, starting at the inception of the disease."*

— Husband Joseph of Papillion, NE  
First Contact Program Participant

## Planned Giving Opportunities

Depending on the choice of the gift and the type of arrangement selection, a donor can generally expect to obtain some or all of the following benefits:

- Fulfillment of philanthropic goals through an investment in the Chapter's work.
- Income-tax savings through the charitable deduction for the value of the gift.
- Avoidance of capital-gain tax on contributions of appreciated assets.
- Payments for life to the donor and for other beneficiaries.
- Potential of increased income.
- Reduction of federal estate tax when the property passes to the charity upon the donor's death.
- Reduced costs and time in estate settlement.
- Knowing that you have helped find a possible cure for Alzheimer's disease or other related disorders.

*By planning ahead, you can help the Alzheimer's Association Midlands Chapter and its mission and also receive tax benefits for yourself and your heirs.*



## A Planning Checklist

- **Do you have an up-to-date will or trust?**  
One of the most common planning mistakes is failing to keep an estate plan current; wills should be updated at least every five years.
- **If you have a living trust, is it fully funded?**  
Living trusts help to avoid conservatorships and probate. Failing to change the title of property into the name of the trust prevents the trust from meeting the goal.
- **Do you have a "Durable Power of Attorney?"**  
A durable power of attorney names another person as your financial representative, making it easier for your family to make decisions if you are unable to. "Durable" means that this power is effective when you are mentally incompetent.
- **Have you appointed a Health Care Representative for yourself and prepared a Living Will?**  
A personal health care representative is empowered to make medical decisions on your behalf when the time comes that you cannot make decisions for yourself.
- **Have you asked the "right" people for advice?**  
Attorneys, accountants, financial planners, and health care advocates should all be part of YOUR team. Just like a corporation uses a board of directors, you should have professional advisors in planning your affairs.
- **Do your planning documents remember your favorite charities?**  
Estate planning provides a unique opportunity to "make a difference" even after you are gone. Planned gifts to the Alzheimer's Association Midlands Chapter can enable the Chapter to continue serving individuals and families suffering from this most debilitating disease while funding research to find a cure.