

# Alzheimer's Association *Thoughtful Planning Guide*



## What legacy will you leave?

You have been generous all your life — lending your time and financial support to the causes that touch your heart, including the Alzheimer's Association. This guide was prepared by the Alzheimer's Association to help you plan for your family's future and your lasting legacy.

How and with whom you choose to entrust your resources says a lot about you. By taking the time to carefully plan how you would like your funds to be shared now, you can have an impact on your family and the causes you care about well beyond your lifetime.



## Gifts that cost you nothing now.

Many people are surprised to learn they can have a large impact on ending Alzheimer's and all other dementia without spending anything today. There are two ways you can leave a lasting legacy in the fight against Alzheimer's and help further our efforts in care, support and research.

### Gifts by beneficiary designation.

One of the least complicated ways to leave a gift to the Alzheimer's Association is by naming us as a beneficiary of any of these types of accounts:

- Retirement funds.
- Life insurance policies and some commercial annuities.
- Brokerage accounts for stocks and mutual funds.
- Bank accounts including CDs, savings and checking accounts.
- Donor-advised funds (DAFs).

These gifts pass directly on to your family or the causes you select, outside of your will. You do not need an attorney to complete your gift.

#### HOW YOU BENEFIT:

- ✓ Retain control of your assets during your lifetime.
- ✓ Change your beneficiaries at any time.
- ✓ Provide for loved ones and help fight Alzheimer's.
- ✓ Leave a gift of any amount; there is no minimum contribution required.
- ✓ Name your gift in honor or memory of a loved one.

### How to make a gift by beneficiary designation:

1. Check your account statement for the phone number and website of your account administrator.
2. Request or download a beneficiary designation form.
3. Designate the Alzheimer's Association as a partial, contingent or sole beneficiary of your account.
4. Sign and return the form to your plan administrator and keep a copy for your files.

### Gifts in a will or trust.

One of the most popular ways to make a lasting impact is to leave a gift to the Alzheimer's Association through your will or trust. You can provide for your loved ones first and still name the Association to receive a specific amount or percentage of your estate. You can also consider naming the Alzheimer's Association as a contingent beneficiary, so we receive a gift only if your loved ones are unable to accept it.

### How to leave a gift in your will, trust, or by beneficiary designation:

Please use the following language or Tax ID number:

"I give [the residue of my estate], or [ \_\_\_\_\_% of the residue of my estate], or [the sum of \_\_\_\_\_ dollars] to the Alzheimer's Disease and Related Disorders Association, Inc. (the Alzheimer's Association) whose home office address is currently 225 N. Michigan Ave., Floor 17, Chicago, Illinois 60601-7633 in support of its full mission."

Alzheimer's Association  
225 N. Michigan Ave., Floor 17  
Chicago, IL 60601-7633  
Tax ID#: 13-3039601

## A gift that pays you income.

Many of our supporters tell us they want to do more to support the Alzheimer's Association, but they are concerned about not having enough money later in life to provide for their families and respond to unexpected challenges.

A gift that provides income in return may be a good option. When you create a charitable gift annuity or a charitable trust, you enjoy many benefits.

### Charitable gift annuity

A charitable gift annuity (CGA) provides annual payments at a fixed amount every year. Your rate is based on your age when you begin payments and will never change. A charitable gift annuity is a simple document created by the Alzheimer's Association. We encourage you to review the document with your advisers prior to signing.

#### HOW YOU BENEFIT:

- ✓ Receive payments for life or a period of years.
- ✓ Provide for your long-term financial needs or those of a loved one.
- ✓ Save on taxes through charitable deductions, reduced capital gains taxes and/or tax-free portions of payments.

### Charitable Remainder Trust

With a charitable remainder trust, you have the maximum amount of flexibility. You choose when your payments begin and how long they continue (up to 20 years). You also choose whether you wish to receive a fixed amount every year or a fixed percentage based on the trust's value at the end of each year. The Association has experts to assist you and your attorney in creating the right trust for you.

### Request your personalized proposal.

We are happy to prepare a no-obligation, customized gift annuity or trust proposal based on your age, number of beneficiaries and when you would like your payments to begin. To request yours, please contact Jill Workman, Senior Director of Planned Giving, at [plannedgiving@alz.org](mailto:plannedgiving@alz.org) or 866.233.5148.

*"I encourage others to consider supporting the Alzheimer's Association with a charitable gift annuity. To be able to collect income for my retirement and leave a legacy for this important cause is deeply rewarding. If the Alzheimer's Association can find a cure, maybe I'll be saving myself, too."*

*- Thomas L.*

## Gifts that save on taxes.

Some people prefer to put their donation to work immediately to provide care and support for people living with Alzheimer's and all other dementia. There are many ways to give beyond simply writing a check, and some offer significant tax savings.

### Gifts from a donor-advised fund.

If you have a donor-advised fund, please consider making a grant recommendation to the Alzheimer's Association. Your gift will help us in our mission to end Alzheimer's and all dementia by accelerating global Alzheimer's research, driving risk reduction and early detection, and maximizing quality care and support.



### Gifts from your IRA.

Donating retirement funds to charity is a tax-savvy way to achieve your goals for retirement, your family and the charities you care about. If you are 70  $\frac{1}{2}$  or older, you can make a charitable donation directly from your Individual Retirement Account (IRA) to the Alzheimer's Association.

### Give to the Alzheimer's Association through your donor-advised fund or IRA:

Provide the following information to the institution that manages your DAF or IRA:

Alzheimer's Association  
225 North Michigan Ave., Floor 17  
Chicago, IL 60601-7633  
Tax ID#: 13-3039601

**ALZHEIMER'S  ASSOCIATION®**

## We are here to help.

If you would like more information about creating your legacy, please contact Jill Workman, Senior Director of Planned Giving, at [plannedgiving@alz.org](mailto:plannedgiving@alz.org) or 866.233.5148.

Jill Workman, Senior Director of Planned Giving  
Alzheimer's Association

225 N. Michigan Ave., Floor 17, Chicago, IL 60601-7633

Toll-free phone: 1.866.233.5148 | Email: [plannedgiving@alz.org](mailto:plannedgiving@alz.org)

For more information about easy ways to leave your legacy, visit [alz.org/plannedgiving](http://alz.org/plannedgiving).

The Alzheimer's Association is a not-for-profit 501(c)(3) organization. Our Tax ID is 13-3039601. Also known as: Alzheimer's Disease and Related Disorders Association.

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