



Creating or Updating My Legacy Plan



The Story of Your Life

Legacy planning is a thoughtful way to share the story of your life with those closest to you. Sharing your personal wishes and charitable values provides security and peace of mind for your family and loved ones.

If someone you love is living with Alzheimer's disease, a legacy gift to the Association can be a meaningful way to make an impact on their life and yours.

If you're a caregiver or have lost someone to Alzheimer's or another dementia, please consider honoring them with a legacy gift.

A legacy gift in your will or trust or by beneficiary designation costs you nothing today. And you maintain control of your assets and may change your beneficiary designations at any time.

14 Essential Documents

These are some of the documents you'll likely need to create your estate plan or update an existing one. Depending on your personal situation, your planning professional may need more, but this is a good starting point.

1. **Current will or trust.**
2. **Financial power of attorney.**
3. **Advanced health care directive.**
4. **Marriage license.**
5. **Divorce papers.**
6. **Mortgage accounts.**
7. **Bank and brokerage accounts.**
8. **Retirement accounts.**
9. **Life insurance policies.**
10. **Certificates for stocks and savings bonds.**
11. **Annuity contracts.**
12. **Vehicle titles.**
13. **List of digital accounts.**
14. **List of usernames and passwords.**

How Often Should I Update My Legacy Plan?

Many planning professionals recommend that you review your plan every two to five years. Unexpected changes in your life, such as those below, could necessitate updates. Check the boxes that apply to you:

	Yes	No
Birth of a child or grandchild	☐	☐
Health concerns	☐	☐
Marriage or divorce	☐	☐
Death of a spouse /partner	☐	☐
A move to a new state	☐	☐
Retirement	☐	☐
Change in beneficiaries	☐	☐
Inherited money or property	☐	☐
Sale of your home	☐	☐
Tax law changes	☐	☐

If you answered “Yes” to any of the questions above, it may well be time to create or update your will.



To learn more, please contact us
at **866.233.5148** or
plannedgiving@alz.org.

Tax-wise Planning

Planning ahead may help you save on taxes and pass on more of your hard-earned assets to loved ones and the causes you care about.

Your benefits may include:

- Increasing your current income.
- Receiving secure, guaranteed income for life.
- Realizing income tax savings.
- Deferring or bypassing capital gains tax.
- Eliminating potential estate tax.
- Diversifying your assets.
- Helping the Association fund research and community programs.

Contact us at **866.233.5148** or **plannedgiving@alz.org** for assistance at no cost to you and with no obligation.



Our vision is a world without Alzheimer's and all other dementia.

We hope you will share in our efforts to accelerate global research, quality care and support.

Please consider including the Association in your legacy plan. Your gift costs you nothing today and will provide help and hope to people facing Alzheimer's and other dementia in the future.



“My dad was an inspiration to me, and I hope, through my gift, I can inspire others to join the fight to end Alzheimer's.”

– Anjanette Kichline

If you or a loved one has been diagnosed with Alzheimer's or another dementia, you can find helpful resources at **alz.org/planforfuture** or by calling **800.272.3900**.

Any information provided here is presented solely as general educational information and is not intended to be a substitute for professional financial, tax, estate planning or legal advice. We encourage you to consult with your attorney, tax advisor and/or financial planner to determine what is best for you.

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