



The Gift That Pays You Back: A Charitable Remainder Trust

ALZHEIMER'S  ASSOCIATION®



A Gift to End Alzheimer's

As a friend of the Alzheimer's Association, we know that you share our vision of a world without Alzheimer's and all other dementia.

Many of our generous donors have honored us with a gift that supports our vision and provides a gift of income to them in return. It's called a charitable remainder trust.

A charitable remainder trust can provide financial security for your family and loved ones. You receive income for life or a set number of years, and the remainder may help us drive the next breakthrough in research and provide care and support for those facing Alzheimer's and all other dementia.

How Does a Charitable Remainder Trust Work?

- You work with your attorney to draft a trust document that names the Alzheimer's Association as a charitable remainder beneficiary.
- You may fund your charitable remainder trust with cash, securities or real estate. Most trusts are funded with a minimum of \$100,000.
- You choose the people you want to receive payments from the trust.
- The payments will continue for the lives of your named beneficiaries or for a term of up to 20 years.
- You may choose a fixed or flexible payout rate, depending on what works best for you.



“It was a natural fit to include the Alzheimer’s Association in our estate plans ... we want to be a part of this battle even when we’re gone. We’ll never stop!”

– Ricci and Andy Sanchez



- You decide who you want to manage the trust. You may manage it yourself or hire a bank, attorney, financial advisor or someone else you trust. The Alzheimer's Association does not manage charitable trusts.
- At the end of the trust term, the remaining gift amount will accelerate research, help provide care for those living with Alzheimer's and move us closer to a cure.
- Because of the immediate tax benefits associated with a charitable remainder trust, your gift is irrevocable per IRS regulations.

What are the Benefits of a Charitable Remainder Trust?

A charitable remainder trust could provide you with security, peace of mind and these additional benefits:

- Your trust provides you or a loved one with payments for life or a fixed number of years.
- Fund your trust with stocks, bonds, mutual funds or real estate, and you may bypass capital gains taxes.
- Your trust investments can help diversify your portfolio.
- You could receive an immediate charitable income tax deduction.
- You help the Association provide much-needed funding for research, care and support.

If our Planned Giving specialists can assist you with any questions you may have, please contact us at **866.233.5148** or **plannedgiving@alz.org**.

Our services are complimentary with no obligation to make a gift.

What Will It Take to End Alzheimer's?

Our mission is to lead the way to end Alzheimer's and all other dementia – by accelerating global research, driving risk reduction and early detection and maximizing quality care and support.

If you have a loved one living with Alzheimer's or another dementia, a charitable remainder trust is a wonderful way to give back and receive a gift of income in return.

You or a loved one will receive secure, guaranteed lifetime income now, while helping people living with Alzheimer's in the future.

If you choose to make a gift to the Alzheimer's Association through you will or trust, please let us know so that we may invite you to join our Founders Society.

The Alzheimer's Association offers many resources to help you with your planning. Contact us at **866.233.5148** or visit **alz.org/pgcontactus**.

The Alzheimer's Association does not serve as a trustee for charitable trusts. The information provided herein is presented solely as general educational information and is not intended to be, and should not be deemed to be, a substitute for professional, financial, estate planning, tax or legal advice. It is important that you consult with your attorney, tax advisor and/or financial planner to determine what is best for you as well as any applicable tax considerations.

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