

# Improve lives, simply by signing your name

## *Gifts that cost you nothing now*



### HOW WILL YOU BE REMEMBERED?

Throughout our lives, there are moments when we pause to reflect on what we have achieved and what we yet hope to accomplish. Over the years, you have made a difference by supporting Alzheimer's care, support and research. Thank you.

Many Alzheimer's Association supporters tell us, "I wish I could do more." You can! By leaving a gift to the Association in a will, trust or by beneficiary designation, you can have an even larger impact and your gift doesn't cost you anything today. Here are some frequently overlooked ways you can leave a legacy of care, support and research simply by signing your name.

### GIFTS BY BENEFICIARY DESIGNATION

Many people like to leave a gift to the Alzheimer's Association by naming us as a beneficiary of any of these types of accounts:

- Retirement accounts
- Life Insurance policies
- Bank or Brokerage accounts
- Certificates of deposit
- Donor Advised funds

### IT'S EASY TO DO. SIMPLY:

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.

### SAVE ON TAXES WITH GIFTS FROM A RETIREMENT ACCOUNT

Leaving a gift to the Alzheimer's Association through your retirement plan account (such as an IRA) is one of the most tax-wise gifts you can make. Because most retirement plans are taxed differently than other funds, they may actually become a tax liability if left to loved ones. Because the Alzheimer's Association is tax-exempt, we receive 100 percent of your gift to create your enduring legacy.

## A POPULAR WAY TO LEAVE A LEGACY

One of the most popular ways to leave a lasting legacy of care, support, and research is by leaving a gift to the Alzheimer's Association in your will or trust. The gift costs you nothing now, but allows you to play a significant role in achieving our vision of a world without Alzheimer's disease. You can provide for your family first and still name the Association to receive a specific amount or percentage of your estate. Or, 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.

## SIMPLY PROVIDE YOUR ATTORNEY WITH THE FOLLOWING LANGUAGE:

"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) in Chicago, Illinois."

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



*"I have three children and nine grandchildren. I want them all to know the importance of making a difference wherever you can in this world. The Association is a place where I think I can make a difference — and I'm certainly not done yet."*

**-Pat Fiske**

*Pat Fiske (right), with his brother Kevin.*

## BENEFITS

These gifts offer you many benefits. You can...

- ✓ Retain control of your assets during your lifetime.
- ✓ Change your beneficiaries at any time.
- ✓ Provide for loved ones and for the Alzheimer's Association.
- ✓ Leave a gift in any amount; there is no minimum contribution required.
- ✓ Designate your gift to care, support or research – or to your local chapter.
- ✓ Or name your gift in honor or memory of a loved one.

## WE'RE HERE TO HELP

We can help you decide on a gift that's right for you. To notify us of a gift you have made or to discuss the best gift option for you, please contact:

Susan Carter, Director, 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) | Tax ID#: 13-3039601

More information about easy ways to create your legacy can be found at [www.alz.org/estate\\_giving](http://www.alz.org/estate_giving).

alzheimer's  association®

THE BRAINS BEHIND SAVING YOURS™