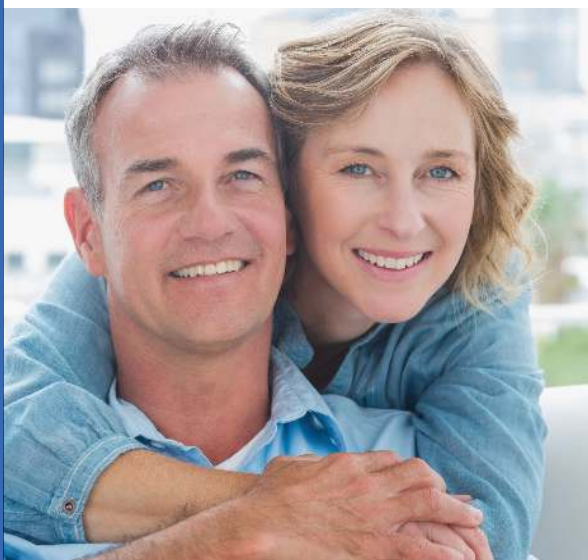


# Planned Giving Guide

**Your Liver  
Your Life  
Your Legacy**



*Your Liver. Your Life.*



## Create Your Legacy

Careful estate planning can help preserve assets and ensure that you have provided for your loved ones. But did you also know that you can use your estate planning documents such as your will, trust or beneficiary designation - to make sure that the causes you value today will thrive in the future?

When you remember The American Liver Foundation (ALF) through a planned or deferred gift, you join a vital group of supporters. American Liver Foundation's **Legacy Society** members share a passionate commitment to our bold, but achievable, vision: **a world without liver disease.**

Legacy gifts help The American Liver Foundation change the course of liver disease by supporting early-career investigators with innovative research projects, and by improving the lives of patients and families impacted by more than 100 different liver conditions.

As you and your advisors determine what your legacy will be, we would be pleased to provide more information on how to best include The American Liver Foundation in your estate plan.

## Advantages of a Planned Gift

Planned giving is easy to do and you don't have to be wealthy to do it.

**Options that fit your needs.** Whether it is naming The American Liver Foundation in your will, living trust or as a beneficiary of an IRA or retirement plan or on your life insurance policy, there is an easy option that is right for you.

**Simple steps.** A few sentences in your will or living trust complete the gift. You can also name The American Liver Foundation as a beneficiary on your life insurance policy, IRA, retirement plan or bank account and a lawyer's services would not be required.

**You can make a gift of any size.** You can designate a specific amount or a percentage of the balance remaining in your estate or trust or IRA or retirement plan after you have provided for your family and friends.

**Tax-wise.** As a result of a planned gift, your estate could benefit from a sizeable estate tax charitable deduction. Naming The American Liver Foundation as a beneficiary of your IRA or retirement plan also reduces income taxes.

***And, your gift will be long remembered.***

## **SOME GIFT TYPES**

**Bequest**

**Retirement Plans**

**Life insurance**

**Savings account**

**Stocks, Bonds & Mutual Funds**

**Real estate**

May reduce estate taxes and you retain control of your assets during your lifetime.

Individual Retirement Accounts (IRAs) or other qualified retirement plans are often one of the best types of assets to leave to charity because they are taxed when left to heirs. Heirs may have to pay estate taxes, but unless you paid income taxes such as on a Roth IRA, distributions are also subject to income taxes.

One of the most effective and convenient assets to donate, and you can retain control during your lifetime.

Retain control over your assets during your lifetime.

Gifts of stocks, bonds, and mutual funds may help you avoid capital gains tax liability. Take an income tax deduction for the full amount of the donation, and contribute to the fight against liver disease.

Gifts of real estate are not limited to personal residences. They include investment or commercial properties, agricultural properties, parcels of undeveloped land, and more. All offer varying tax advantages.

## Your Next Steps

It's easy to designate The American Liver Foundation as a recipient of your planned gift. Please take the next steps to support the future of America's liver health!

### **Request Sample Wording**

We will be pleased to send you the sample wording needed to make a gift to The American Liver Foundation through your will. You should share this with an estate planning attorney.

### **Name Us in Your Plans**

- Contact your Life Insurance Company, retirement plan administrator, bank, or other financial institutions to request the forms needed to designate a beneficiary.
- Name The American Liver Foundation Inc. as a whole or partial beneficiary of the account – or a percentage of the value — and return the updated form to your financial institution.

### **Let Us Know About Your Legacy**

If you include The American Liver Foundation in your estate plans, please call us at (646) 737-9405 or email [egoodman@liverfoundation.org](mailto:egoodman@liverfoundation.org). We want to thank you personally for your gift, bring you up-to-date on our liver research, and invite you to join our liver health awareness campaigns.

## **About Us**

The American Liver Foundation's mission is to promote education, support services and research for the prevention, treatment, and cure of liver disease.

## **Have a Question?**

We are available to answer any questions you may have about estate giving. We are here to work with you, your family, and your legal advisors to create plans that best suit your needs and reflect your legacy for the future of America's liver health.

*Please Contact:*

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The information provided is not intended by The American Liver Foundation as legal advice. Any reference to estate and income taxes include federal taxes only. State income/estate taxes or state law may impact your results. Consulting with an attorney skilled in estate planning is essential to developing estate plans that meet your particular circumstances. The concepts discussed herein are intended to suggest strategies and are presented for illustrative purposes only. If you do not want to receive development communication from The American Liver Foundation, please email [egoodman@liverfoundation.org](mailto:egoodman@liverfoundation.org), visit us online at [www.liverfoundation.org/optout](http://www.liverfoundation.org/optout) or call 212-668-1000.



*Your Liver. Your Life.*

American Liver Foundation

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