

STAND UP FOR THE FOUNDATION!

By Suzanne Harris

Supporting the Foundation through planned giving may be easier than you think. When you include the Foundation in your will, or make the Foundation a beneficiary, you can make a gift that will take effect after your other obligations are fulfilled - you can care for those who are important to you now and later.

There are several ways to make a planned gift to the Foundation right now. Perhaps the easiest is by making the Foundation the beneficiary of life insurance or other benefits. It's easy as one, two, three. First, just get a change of beneficiary form from your plan administrator. Fill out the form making the Foundation the contingent beneficiary to a dollar amount of your choosing. Finally, send the completed and signed form back to the plan administrator, notifying the Foundation with a copy and a pledge card, which is available at <http://aamlfoundation.org/planned-giving>. Easy, right?

Not only is it easy, it saves the assets from being lost to taxes! If you leave an IRA, 401k or most other retirement assets to anyone besides a spouse - including children – up to 70% of the plan's value may be lost to taxes. Instead, think about following the above easy steps to leaving a portion of your retirement assets to the Foundation. By doing so, you maintain complete control over the assets while you are living. Your gift of plan assets will accomplish a charitable goal while realizing significant tax savings. The plan assets will pass to support the Foundation free of both estate and income taxes.

Whether you would like to shout it out and inspire others, or whisper it to us and remain anonymous, we would love to know if you have included the Foundation in your plans. Once you inform us, we can ensure that your gift is acknowledged and we can welcome you to our Planned Gifting Benefactor's honor roll. You will be honored each year at the Foundation Luncheon and in publications to your Fellows.