We hope you will tell us when you have made a planned gift to the Alpha-1 Foundation. We would like the opportunity to thank you for your generosity. If you prefer to remain anonymous, your gift will be kept completely confidential. Whichever the case, we will honor your wishes.

Individuals making a planned gift of $5,000 or more shall be recognized in the Foundation's Annual Report as a member of the Alpha-1 Legacy Society.

Additional information

For additional information or to discuss planned gifts to the Foundation, please contact Angela McBride at amcbride@alpha-1foundation.org or call 888-825-7421, Ext 233, or write to us at:

Alpha-1 Foundation
2937 S.W. 27th Avenue
Suite 302
Miami, FL 33133
Attention: Angela McBride

www.alpha-1foundation.org
1 (877) 2 CURE A1 | 1 (877) 228.7321
2937 S.W. 27th AVENUE · SUITE 302
MIAMI, FL 33133

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Planned Giving

A planned gift can benefit you, your loved ones and the fight for a cure for Alpha-1 Antitrypsin Deficiency (Alpha-1) and can be a powerful element of your overall financial strategy.

Anyone, regardless of age or income, can gain from financial and estate planning. Planned giving can enable charitable donation at a level that you might not have thought possible, while maximizing the tax benefits for you and your family. You’ll contribute to finding a cure for Alpha-1 while enhancing your present and future financial security as well as that of your loved ones.

Please note that planned gifts should be carefully considered in relation to your comprehensive financial and estate plans. It is strongly recommended that you consult your financial advisor and an attorney in the preparation of your Will or another type of planned gift and supervise its execution so as to comply with your state requirements.

The Alpha-1 Foundation provides several planned giving options:

Bequests
One of the easiest and most common ways to make a gift to the Alpha-1 Foundation is through a bequest in your Last Will and Testament. Bequests work particularly well for those who are unable to make an outright gift, but would like to aid the Alpha-1 Foundation in the future. A bequest can be simply stated as follows:

“I bequeath to the Alpha-1 Foundation, Inc. located at 2937 S.W. 27th Avenue, Suite 302, Miami, Florida 33133 (federal taxpayer identification number 65-0585415), the sum of ______________ or _____________% of my residuary estate (or an accurate description of securities, real estate or other property given) as an unrestricted bequest to be used for the organization’s stated mission of providing leadership and resources that will result in increased research, improved health, worldwide detection and a cure for Alpha-1.”

Gifts of Insurance
For insurance to qualify as a gift, the ownership of whole life, endowment or certain universal life insurance policies must be transferred to the Foundation with the Foundation also named as the irrevocable beneficiary of the policy.

Retirement Assets
Some assets are not transferred through a Will. These include assets in a qualified retirement plan (qualified plans include an IRA, Keogh, 401(K), 403(B), or defined benefit plan) that remain after your lifetime. Often, a retirement plan is a pre-tax asset and, when transferred to a beneficiary, is subject to estate tax as well as income tax. Naming the Alpha-1 Foundation as the beneficiary of your qualified retirement plan may be advantageous and financially judicious. Most often, all that is required is to name the Foundation on the beneficiary line when you sign up for your retirement plan, or to modify your current election by notifying your plan administrator.