



Alzheimer's
ORANGE COUNTY

LEGACY GIVING OPPORTUNITIES



What Will Your Legacy Be?

By remembering Alzheimer's Orange County in your estate plans, you can make an impact while enjoying financial benefits for yourself.



YOUR GENEROUS GIFT CREATES THE LEGACY OF TOMORROW.

- Your planned gift will help us carry out our mission with long-lasting support.
- You can benefit from significant tax savings while providing for a cause that is meaningful to you.
- You can give a future gift through estate plans or an immediate gift that returns income.

There are many ways to support the mission of Alzheimer's Orange County beyond your lifetime.

■ BEQUESTS

A bequest is a heartfelt gift made through a will or living trust passed directly to Alzheimer's Orange County and is one of the easiest and most popular ways to show your support. There are a number of ways to make a bequest to Alzheimer's Orange County:

- **Specific Bequest:** A specific bequest involves making a gift of a specific dollar amount from your estate or making a gift of an asset such as real estate or other property. For example, you may wish to leave \$10,000 to Alzheimer's Orange County or leave your vacation home.
- **Percentage Bequest:** Another specific bequest involves leaving a specific percentage of your overall estate to charity. For example, you may wish to leave 10% of your estate to Alzheimer's Orange County.
- **Residual Bequest:** A residual bequest is made from the balance of an estate after the will or trust has been given away to each of the specific bequests. A common residual bequest involves leaving a percentage of the estate to charity. For example, you may wish to leave 25% of the residual of your estate to Alzheimer's Orange County

What are the benefits of making a

1. *You leave a lasting legacy to be remembered*
2. *You lessen the burden of taxes on your family*
3. *You may receive estate tax savings*
4. *You can change at any time and doesn't cost you anything today*
5. *You can still benefit heirs with gifts*

To learn more about bequests, contact margie.wright@alzoc.org or jim.mcaleer@alzoc.org

Please be sure to use our **current Tax ID: 95-3702013**

Current Address: 2515 McCabe Way, Suite 200, Irvine CA 92614

WHAT TO GIVE?

There are many assets to consider when making a planned gift online. Options include:



GIFT OF STOCKS
& BONDS



GIFTS OF RETIREMENT
ASSETS



GIFTS OF CASH



GIFTS OF LIFE
INSURANCE



GIFTS OF BUSINESS
INTERESTS



GIFT OF REAL
ESTATE

Learn more online.
www.alzoc.org/gift



ADDITIONAL WAYS TO GIVE

■ BENEFICIARY DESIGNATION

A beneficiary designation is a simple and affordable way to support the future of Alzheimer's Orange County and does not require an attorney. You can designate Alzheimer's Orange County as the beneficiary of an investment or bank account or qualified retirement plan such as an IRA, 401(k) or life insurance policy.

■ IRA CHARITABLE ROLLOVER

An IRA charitable rollover allows donors 70½+ to give directly from their IRA and potentially reduce taxable income.

Benefits

- *Avoid taxes on your IRA QCD transfers up to \$111,000 (2026 amount per individual. A married couple could give \$222,000 if they each have an IRA).*
- *Depending on your birth date, it may satisfy your required minimum distribution (RMD) for the year.*
- *Reduce your taxable income even if you do not itemize deductions*

■ DONOR ADVISED FUNDS

Donor advised funds (DAF) can be used as your own charitable savings account. You can steadily deposit assets into it and then direct those funds to support Alzheimer's Orange County, among your other charitable interests when you are ready.

Create income for yourself today and lasting support for Alzheimer's Orange County tomorrow.

■ CHARITABLE GIFT ANNUITY

Transfer cash or stock to establish a Charitable Gift Annuity, receive fixed lifetime payments from the organization, potential tax benefits, and support Alzheimer's Orange County.

■ CHARITABLE REMAINDER TRUST

Transfer cash, securities, or real estate into a Charitable Remainder Trust, receive income for life or a term of years, and potentially avoid capital gains taxes.



“I give to change the future of dementia in Orange County and to leave a lasting legacy of hope that will change local lives.”

— J.S., Legacy Member

LEAVING YOUR LEGACY: BECOME A MEMBER OF THE LEGACY SOCIETY

By creating a Legacy gift and notifying us that you have named Alzheimer's Orange County as a beneficiary, you will become a member of the Legacy Society. This unique group honors those individuals that have included Alzheimer's Orange County in their will, living trust, or estate plan; named Alzheimer's Orange County as the beneficiary of an insurance policy or retirement plan, or who have created a gift annuity or trust in which Alzheimer's Orange County is the remainder beneficiary.

Unique benefits include:

- Recognition on the Alzheimer's Orange County website if desired.
- Invitation to the Legacy Society Annual Appreciation Luncheon/Research Talk.
- Free admission to Alzheimer's OC's annual brain health conference.

Join our Legacy Society today and see how your gift to Alzheimer's Orange County makes a lasting impact. Irrevocable gifts made today can create naming opportunities!

CONTACT US TO GET STARTED



Alzheimer's Orange County is here to help you plan and fulfill your philanthropic goals.



SCAN TO SUBMIT
YOUR INFORMATION

Alzheimer's Orange County offers this information for educational purposes only. This brochure is not intended for professional tax, legal or accounting advice. Please consult your advisors for specific advice on gifting vehicles and the benefits to you.

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CONTACT:
margi.wright@alzoc.org
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