



Advancing Sight
Network®

RESTORING SIGHT THROUGH YOUR **PLANNED GIFTS**

WHAT IS PLANNED GIVING?

A planned gift is a charitable contribution that is part of your estate plan or your overall financial plan. If you are considering a planned gift, Advancing Sight Network encourages you to speak to your financial planner or attorney.

IN LIEU OF FLOWERS

If you prefer charitable gifts be made to Advancing Sight Network rather than flowers, you can use this simple language:

In lieu of flowers, please make memorial gifts to Advancing Sight Network.

Gifts may be made online at

www.advancingsight.org/give-financially

or by mail to:

Advancing Sight Network
Development Office
500 Robert Jemison Road
Birmingham, AL 35209



QUESTIONS? I CAN HELP!

Candice Lee
Director of Development
clee@advancingsight.org
(205) 540-3361

CREATE YOUR LEGACY

You can restore eyesight for the next generation through your planned gift. We would love to talk with you about what you would like your gift to accomplish. There are several simple ways you can impact the future of Advancing Sight Network through your planned gift.

- **Give through your will or trust** – Use this sample language to add Advancing Sight Network to your will or trust.
- **Give through your retirement plan or life insurance policy** – Designate Advancing Sight Network as a beneficiary or co-beneficiary of your insurance policy or retirement plan.
- **Give through your IRA** – Gifts can be made directly from your IRA and may impact your income taxes.

We are happy to work with your financial advisor or attorney to provide information for charitable annuities, charitable trusts, or other planned gifts.

When including Advancing Sight Network in your estate plans, please use our Federal Tax ID Number: 63-0880135

SAMPLE LANGUAGE FOR YOUR WILL

Thank you for considering an estate gift to Advancing Sight Network. Please consult your attorney or financial adviser for advice. The sample language below can be used as a guide for creating a gift through your will or trust.

General Outright Bequest (specific dollar amount)

I give, devise, and bequeath to Advancing Sight Network (Employee Identification Number 63-0880135, 500 Robert Jemison Road, Birmingham, AL 35209) the sum of \$ -- to be used for the general purposes of Advancing Sight Network at the discretion of its Board of Trustees.

General Percentage Bequest

I give, devise, and bequeath to Advancing Sight Network (Employee Identification Number 63-0880135, 500 Robert Jemison Road, Birmingham, AL 35209) --% of the rest and residue of my estate to be used for the general purposes of Advancing Sight Network at the discretion of its Board of Trustees.

General Residuary

I give, devise, and bequeath to Advancing Sight Network (Employee Identification Number 63-0880135, 500 Robert Jemison Road, Birmingham, AL 35209) the rest and residue of my estate to be used for the general purposes of Advancing Sight Network at the discretion of its Board of Trustees.

Leaving Money for a Specific Purpose

Advancing Sight Network will do everything possible to honor your wishes for your estate gift. If you wish to designate all or a portion of your estate gift for a specific purpose within Advancing Sight Network, please speak to us first and consider using the following language in your will or trust:

It is my preference that the gift is used for the specific purpose intended. However, I understand and agree that if, at some future time, it is no longer practical in the judgement of Advancing Sight Network's Board of Trustees to use the gift for the intended purpose, the Trustees will use the gift for purposes they deem necessary. The Trustees will maintain integrity in using the gift in a manner as close to my original intent as is practical and reasonable.

Specific Purposes May Include:

The Robert L. Phillips Scholarship, Advancing Sight Global for International Work, Ocular Research, and the Advancing Sight Network Endowment for the Future

Advancing Sight Network is a 501(c)(3) nonprofit organization, Employee Identification Number/Tax ID Number 63-0880135.

RESTORING EYESIGHT WITH YOUR IRA

A Special Opportunity for People 70 ½ and Over

You can give up to \$100,000 per year from your IRA to a qualified charitable organization such as Advancing Sight Network without paying income taxes on the gift. This gift is called an IRA Charitable Rollover or a Qualified Charitable Distribution (QCD).

- This gift can be made directly from your IRA trustee.
- You do not pay tax on any IRA distribution given directly to a charity (up to \$100,000 per year).
- This option only applies to IRAs and does not include other retirement plans.
- When you turn 72, you can use your IRA Charitable Rollover to satisfy all or part of your required minimum distribution (RMD).
- Since the gift doesn't count as income, it may reduce your annual income level and have an impact on Medicare premiums and/or Social Security that are subject to tax.
- Your gift must be received by December 31 to count for the calendar year.

Please contact your attorney or financial advisor for specific information about IRA Charitable Rollover and your finances.

NEXT STEPS

- Contact your financial advisor or attorney.
- Contact Candice Lee in Advancing Sight Network's Development Office.
- Please make sure Advancing Sight Network is aware of your gift intentions. Many financial institutions assume no responsibility for notifying the nonprofit of gifts made.

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