



PLANNED GIVING

With a planned gift to the Brain Injury Association of America, you can combine your desire to give to charity with your overall estate planning, tax, and financial goals. You will help those whose lives have been affected by brain injury for generations to come.

MAKE YOUR BRAIN INJURY ASSOCIATION OF AMERICA LEGACY GIFT.

Bequests

- Residuary bequests give all or a portion of the remainder of your estate after payment of expenses and any specific amounts designated to other beneficiaries.
- Specific bequests are used to make a gift of a specific dollar amount or specific assets, such as stocks, bonds, real estate, or personal property.

Contingent bequests in your will allow you to name as an alternate beneficiary of your will, personal trust, or retirement plan in the event that one or more of your specific bequests cannot be fulfilled.

If you want to leave a legacy for the Brain Injury Association of America, you may use the suggested wording shown below. Please keep in mind that each individual situation is unique; therefore, these samples include only some of the possible gift opportunities. We encourage you to share your plans with us to ensure that your wishes will be properly followed and recognized.

Sample Bequest for Specific Gift Amount

I give, devise, and bequeath to the Brain Injury Association of America (Tax ID No. 04-2716222) the sum of \$______ in cash (or _____ stock) to be used for the general purposes of the Brain Injury Association of America.

Sample Bequest for Percentage of Estate

I give, devise, and bequeath to the Brain Injury Association of America (Tax ID No. 04-2716222)
______percent (%) of the rest, residue, and remainder of my estate as an unrestricted gift to be used for the general purposes of the Brain Injury Association of America.

Sample Contingent Gift Language

If (insert name) is not living at the time of my demise, I give, devise, and bequeath to the Brain Injury Association of America, (Tax ID No. 04-2716222) the sum of \$ ______ (or all or a percentage of the residue of my estate) to be used for its general support (or for the support of a specific program or fund).



Retirement Plan Beneficiary

Naming the Brain Injury Association of America as the beneficiary of a qualified retirement plan such as a 401(k), 403(b), or Individual Retirement Account (IRA) will accomplish a charitable goal while realizing significant tax savings. It can be costly to pass such assets on to heirs because of heavy tax consequences.

By naming the Brain Injury Association of America as a beneficiary of your retirement plan, you maintain complete control over the asset while living and upon death pass the asset to the Brain Injury Association of America free of both estate and income taxes.

Charitable Remainder Trusts

Charitable Remainder Trusts are gift arrangements that enable you to contribute to the Brain Injury Association of America while providing financial support for yourself or others.



- A Charitable Remainder Trust allows you to:
- 1 Claim a charitable tax deduction in the year the gift is made.
- 2 Retain an income stream from the gift for yourself or others.
- 3 Remove the assets from your taxable estates and leave a substantial gift to charity.
- 4 Avoid capital gains taxes on appreciated assets donated to the trust.

Contact Us

Please <u>contact us</u> if you have any questions about how to make a bequest to the Brain Injury Association of America or to request any additional information that might be helpful to you and your attorney as you consider making a bequest to us.

If you have included a bequest in your estate plan, please let us know as we would thank you and recognize you for your gift.

Brain Injury Association of America

Tel: (703) 761-0750 Email: development@biausa.org

4

