



## PLANNED GIVING

A planned gift is a special way to contribute to the work of the Foundation for Post-Acute and Long-Term Care Medicine. There are planned giving options that leverage your assets and that may also produce tax benefits, even income for you or other family members. There can be a lot to learn and consider about planned gifts and the Foundation encourages its members and donors to obtain professional financial, tax and legal advice.

This form is provided so that you can let us know of your interest and plans; **it is not binding**. Please complete it as appropriate for you and we will provide you with helpful information or resources. All contacts with the Foundation about planned gifts are considered confidential.

*Yes, I have included the Foundation in my estate plan by way of the following:*

- |  |  |
|--|--|
| <input type="checkbox"/> Bequest in Will or Trust        | <input type="checkbox"/> Beneficiary of Retirement Plan Assets |
| <input type="checkbox"/> Beneficiary of Insurance Policy | <input type="checkbox"/> Beneficiary of Charitable Trust       |
| <input type="checkbox"/> Other                           |  |

*I have not yet included the Foundation in my estate plan but I am interested in learning more about estate planning and the Foundation. Please send the following information to me at the email address listed below.*

- Codicil to amend my will so that we can add the Foundation to my estate plan
- Bequest language for my will or trust – four options
- What Every AMDA Member Should Know About Planned Gifts*
- 25 Important Estate Documents You Need to Put in One Place*
- How to transfer assets to the Foundation such as investments, real estate, or other property
- Supporting a specific program or contributing to the Foundation's endowment fund

Name:

Street Address:

City:

State:

Zip:

Phone:

Email:

Signature:

If you have question or need assistance, please contact the Foundation office at 410-992-3134 or [cewing@paltc.org](mailto:cewing@paltc.org).