

## Alpha-1 Legacy Society

The Alpha-1 Legacy Society is open to all those that leave the Alpha-1 Foundation a planned gift, no matter the amount. Being a member of the society allows us to thank you for your generosity and will help us advance our mission for generations, while being a part of your lasting legacy.

Members of the Alpha-1 Legacy Society are entitled to the following benefits:

- Special member reception at annual National Conference
- Annual meeting with Alpha-1 Foundation leadership
- Invitations to attend research update meetings
- Society lapel pin to wear to events
- Alpha-1 Legacy Society newsletter
- Recognition in the Alpha-1-To-One magazine
- Special recognition at meetings and conferences

## The John W. Walsh Founders Circle

This circle is named after John W. Walsh, Co-founder of the Alpha-1 Foundation, who dedicated his life's work to finding a cure for Alpha-1 and is intended to pay tribute to his commitment and legacy. Members of this circle would have notified the Alpha-1 Foundation of their plans of having the Alpha-1 Foundation as a primary beneficiary of \$50,000 or more of a planned gift. Additional benefits include recognition on a plaque at the Alpha-1 Foundation offices and a reception for members at the biennial Investigators meeting to hear researchers report on their studies.

We hope you will notify us when you have made a planned gift to the Alpha-1 Foundation. Visit [a1f.org/LegacySociety](http://a1f.org/LegacySociety) to sign up and complete a Planned Gift Intention Form. If you prefer to remain anonymous, your gift will be kept completely confidential.

## Additional Information

Whether you've already decided to make a legacy gift or are exploring your options, our team is happy to help! Please contact us with any questions. Contact Angela McBride at [amcbride@alpha1.org](mailto:amcbride@alpha1.org) or call 877-228-7321 Ext. 233 or write to us at:

Alpha-1 Foundation  
3300 Ponce de Leon Boulevard  
Miami, FL 33134



The Alpha-1 Foundation is committed to finding a cure for Alpha-1 Antitrypsin Deficiency and to improving the lives of people affected by Alpha-1 worldwide.

The Foundation also offers a wide array of programs for people diagnosed with Alpha-1, their families, caregivers and healthcare providers.

[www.alpha1.org](http://www.alpha1.org)  
1 (877) 2 CURE A1 | 1 (877) 228-7321  
3300 Ponce de Leon Blvd.  
Coral Gables, FL 33134

## Alpha-1 Foundation Planned Giving



Learn how a donation may fit into your financial, tax or estate goals. Planned gifts, large and small, have a powerful effect on the Alpha-1 Foundation's work to advance research.



## Planned Giving

A planned gift can benefit you, your loved ones and 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 a 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 3300 Ponce de Leon Boulevard, Miami, Florida 33134 (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 finding a cure for Alpha-1 Antitrypsin Deficiency and to improving the lives of people affected by Alpha-1 worldwide."

Ready to get started? We've partnered with FreeWill to provide an online estate-planning tool that makes planned giving easier than ever. In 20 minutes or less, you can write your free will and include the necessary language to support the Alpha-1 Foundation with a bequest. Get started here: [www.freewill.com/Alpha1](http://www.freewill.com/Alpha1).

### 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 Alpha-1 Foundation with the Alpha-1 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) 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 Alpha-1 Foundation on the beneficiary line when you sign up for your retirement plan, or to modify your current election by notifying your plan administrator.

Getting started on supporting the Alpha-1 Foundation through your retirement assets is easier than ever. For those 70.5 or older with a traditional IRA, this free resource makes it simple to support our work in 10 minutes or less. You can find the necessary paperwork for your custodian and complete your gift online or by hand. It also helps to calculate your potential tax savings. Learn more and get started here: [www.freewill.com/qcd/alpha1](http://www.freewill.com/qcd/alpha1)

