

## Why Choose Us

The Fisher Center for Alzheimer's Research Foundation is an organization that provides millions of dollars for breakthrough Alzheimer's research primarily conducted at the Fisher Center lab at The Rockefeller University – one of the largest and most modern scientific facilities in the world – as well as other national and international research institutes.

Our mission is to understand the **causes** of Alzheimer's disease, improve the **care** of people living with it, and find a **cure**.



## ALZHEIMER'S DISEASE IS THE 6TH LEADING CAUSE OF DEATH IN THE UNITED STATES



EVERY  
**65**  
SECONDS someone in the U.S. develops the disease

**MORE THAN 6 MILLION AMERICANS ARE LIVING WITH ALZHEIMER'S**

Our vision is working towards a future when Alzheimer's is nothing but a memory.



Proud recipient of Charity Navigator's highest 4-Star ranking and Guide Star's Gold Seal of Transparency

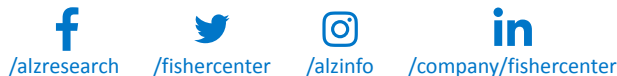
501(c)(3) not-for-profit, Tax ID # 13-3859563



FISHER CENTER FOR  
**ALZHEIMER'S**  
RESEARCH FOUNDATION  
ALZinfo.org

1.800.ALZ.INFO (259.4636)  
Email: [info@alzinfo.org](mailto:info@alzinfo.org)

FDR Station, PO Box 220, New York, NY 10150



## PLANNED GIVING GUIDE

Your legacy can make a big difference to our mission, while supporting a cause you care about.

Support the mission of the Fisher Center for Alzheimer's Research Foundation by making a gift that will cost you nothing during your lifetime. A strategically planned gift, like a tribute gift through your will, leaves a lasting statement about what's most important to you.

## Your Legacy

After making provisions for loved ones and friends, one or more charitable interests are often included in a will or living trust. The plans you make today help define your legacy and ensure that your wishes are carried out. Through a proper will, you can have a significant impact on the cause you care about. You can play an instrumental role in finding a cure for Alzheimer's disease.



## PLANNED GIVING OPTIONS

### Bequest

A bequest is a gift included in a will that takes effect at death. You may make a bequest to nonprofit organizations like the Fisher Center by either executing a new will or amending an already existing will.

### Charitable Lead Trusts

A charitable lead trust allows you to donate to nonprofit organizations, like the Fisher Center, for a certain number of years, while leaving the remaining assets to individuals designated by you. To create such a trust during your life, you must transfer assets (e.g., cash, stocks, real estate) to a trustee through a trust agreement. The trustee then invests your assets and makes payments to the nonprofit organization(s) of your choice for a specified number of years. When the term of the trust ends, the assets (plus any appreciation in their value) will pass to designated non-charitable beneficiaries.

### Charitable Remainder Trusts

A charitable remainder trust allows you to gift an interest in property to non-charitable beneficiaries (e.g., children, grandchildren, yourself) for a certain number of years while leaving the remaining assets to nonprofit organizations, like the Fisher Center. To create such a trust during your life, you must transfer assets (e.g., cash, stocks, real estate) to a trustee through a trust agreement. Payments from the trust are made to you and/or other designated non-charitable beneficiaries for a specified number of years. When the term of the trust ends, the remaining assets pass to the nonprofit organization.

### Life Insurance / Retirement Plans

If retirement plan accounts (e.g., 401k, IRA) are left at your death to anyone other than a surviving U.S. citizen spouse, such accounts are subject to both income and estate taxes (if left to a surviving U.S. citizen spouse, then only income taxes are payable). You can also leave your accounts to a nonprofit organization, free of income and estate taxes. Ask your financial advisor or accountant for more information.



estate documents  
you need to put  
in one place

- ✓ **The Essentials**
  - Will
  - Letter of Instruction
  - Trust Documents
  - Financial Power of Attorney (POA)
  
- ✓ **Marriage and Divorce**
  - Marriage License
  - Divorce Papers
  - Military Documents (DD214)
  
- ✓ **Health-Care Confidential**
  - Personal and Family Medical History
  - Durable Health-Care Power of Attorney
  - Authorization to Release Health-Care Information
  - Living Will
  - Do-Not-Resuscitate Order
  
- ✓ **Proof of Ownership**
  - Housing, Land and Cemetery Deeds
  - Escrow Mortgage Accounts
  - Proof of Loans Made and Debts Owed
  - Vehicle Titles
  - Stock Certificates, Savings Bonds and Brokerage Accounts
  - Partnership and Corporate Operating Agreements
  - Tax Returns
  
- ✓ **Life Insurance and Retirement**
  - Life-Insurance Policies
  - Individual Retirement Accounts
  - 401(k) Accounts
  - Pension Documents
  - Annuity Contracts
  
- ✓ **Bank Accounts/Social Media**
  - List of Bank Accounts
  - List of all User Names and Passwords
  - List of Safe-Deposit Boxes