

Through our Association, lives are changing...

I want to make a difference. How can I donate to The Legacy Society?



Gifts by a Will

A variety of types of bequests can be made through your will, including an Outright Bequest, Residuary Bequest and Contingent Bequest. **Outright Bequests** allow specified assets to be transferred to TMA in the form of real estate, cash, personal property, life insurance, business interests, or other property. **Residuary Bequests** allow a donor to give either all or a portion of his/her residuary estate to TMA after other bequests are made to family members or others. **Contingent Bequests** require a contingency to occur before TMA receives any assets, such as the death of another family member.



Charitable Trusts

There are two types of Charitable Trusts. **Charitable Remainder Trusts** can provide you with a current tax deduction, avoidance of capital gains and estate taxes, an increase in income for your life and your spouse's life, and a gift to TMA when the trust terminates. **Charitable Lead Trusts** can provide an income stream to TMA and pass assets to your heirs with little or no gift and estate tax.



Retirement Plan Assets

Donors may name TMA as the beneficiary on qualified retirement plans or IRAs. Since retirement assets are heavily taxed upon death, (as much as 75% of the value of an IRA may be lost to taxes) many donors choose to leave their retirement plan assets to a charity and leave family members other assets such as cash, real estate or stock. Retirement plan assets that can be donated include 401(k) plans, 403(b) plans, Keogh plans, SEP plans, IRAs and Roth IRAs.



Life Insurance

The gift of life insurance is often one of the largest gifts you can make and it requires very little cost to the donor. If you decide to donate a life insurance policy to TMA that you no longer need, you will receive current income tax deductions and possible future deductions through gifts to pay policy premiums.



Real Estate & Personal Property

Giving real estate to TMA rather than an individual provides an income tax deduction and avoids estate, gift and capital gains taxes. With both parties consenting, long-term appreciated real estate can also be sold for less than its value as a "bargain sale." The transaction gives you a charitable deduction for the difference between the sale price and the fair market value.

Gifts of personal property can provide tax deductions while not substantially diminishing the value of an estate. Many times, families may have multiples of some items that TMA has a need for, or, you may have an item that you no longer use. TMA can provide you with a tax deduction for your gift, then either use the item or sell it to fund our mission.

Please consult your attorney, CPA or financial advisor to determine which option is best for your individual situation.

Why should my planned giving include TMA?

The mission of The Myositis Association is to find a cure for inflammatory and other related myopathies, while serving those affected by these diseases. TMA accomplishes this through patient and physician education, support groups, research and advocacy.

Your gift to TMA will help insure we can continue to provide and expand much needed services to those physically challenged with Myositis and provide for research into curing Myositis.

Your planned gift can start right here, with this clear, concise and powerful blueprint of how a charitable bequest to TMA works, and what an easy and flexible gift it can be for you. It's the gift that won't affect your cash flow or lifestyle.

There are several ways to make a gift that will have an impact on future generations. Some of the most popular are described in this brochure. Consider this information as a starting point. To obtain the most benefit, please consult with our office and with an attorney, CPA and/or a tax advisor before making any planned gift.

As a contributor to TMA through planned giving, you will become a member of The Legacy Society. Gifts through The Legacy Society can be added to TMA's Endowment Fund – providing long-term support for the program and maintenance needs of TMA's mission, Research Fund or Annual Operations Fund, depending on the contributor's desire.

For more information on TMA's Legacy Society, please call 703.299.4850 or 800.821.7356

www.MYOSITIS.org



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Planning for our future...



Your Guide To Planned Giving &

**The Myositis Association's
Legacy Society**

*The Myositis Association is a 501©3 public,
nonprofit organization.*