ALL GIFTS, LARGE OR SMALL, NOW OR IN THE FUTURE, MAKE A MEANINGFUL IMPACT ON THE FUTURE OF THE VHL ALLIANCE

By adding a few simple words in your will or trust, or by designating the VHL Alliance as the beneficiary of your retirement plan, life insurance policy, or commercial annuity, your gifts will save lives for generations to come by helping us to focus on research, education, and support to improve awareness, diagnosis, treatment, and quality of life for those affected by VHL. Join us as we seek to **Cure Cancer through VHL**! It's Easy. Here's How.

**Gifts in Wills or Trusts**

**Step 1:** Decide on the **amount of your gift** (specific dollar amount, specific property, or percentage of your total estate)

**Step 2:** Be sure to use **our correct legal name** (see below)

**Step 3:** Contact your legal professional to make a simple change to your will or trust or see instructions below for designating the VHL Alliance as the beneficiary of your retirement plan, life insurance, or commercial annuity.

Legal Name: **VHL ALLIANCE**  
Type of Corporation: **501(c)(3) non-profit organization**  
Tax ID #: **04-318-0414**  
Address: **1208 VFW Parkway, Suite 303, Boston, MA 02132**

**Suggested Gift Language for your Will or Trust**

- “I give to the **VHL Alliance** the sum of $______________ to be used for its general purposes.”
- “I give to the **VHL Alliance** _____% (insert percentage) of the rest, residue, and remainder of my estate to be used for its general purposes.”
- “I give to the **VHL Alliance all** of the rest, residue, and remainder of my estate to be used for its general purposes.”
- “I give to the **VHL Alliance** the real property known as _________ (insert street address, Assessor's Parcel Number and legal description of real property) to be used for its general purposes.”
- “I give to the **VHL Alliance** my ___________ (provide description of bank account(s), stocks, bonds, mutual funds, or specific personal property) to be used for its general purposes.”

We hope that you will let us know so that we can thank you and invite you to become a member of the **VHLA Legacy Circle**.
Retirement Plans

Retirement plan assets such as Individual Retirement Accounts (IRAs), 401(k), 403(b) accounts, thrift savings accounts, etc., are easy-to-give assets that pass completely income tax-free to the VHL Alliance without probate proceedings and without complex trust or estate administration proceedings. The VHL Alliance, a 501c(3) non-profit organization, is a Qualified tax-exempt charity and does not pay income taxes on distributions from retirement plan assets.

If you designate your non-spousal family or friends as beneficiaries, then much of the retirement account or plan will be taxed when the account is distributed (after your passing).

Choosing the VHL Alliance as the beneficiary of your retirement plan ensures that your hard earned money goes to a cause you care about instead of the Internal Revenue Service and your state’s Department of Revenue.

The example below shows the tax benefits of giving retirement plan assets to the VHL Alliance and leaving other non-taxed assets to family; may vary by state.

A Typical Example
Constance has a $100,000 retirement plan. She would like to support the VHL Alliance through her estate. She would also like to leave an inheritance to her brother after she passes away.

If Constance designates VHILA as beneficiary:
- 100% of her plan’s assets will be distributed to VHILA—tax-free.
- VHILA will receive the full $100,000

If Constance designates her brother as beneficiary:
- He will have to pay an estimated 37.3% or $37,300 in taxes.*
- Brother will receive just $62,700, not $100,000.

* Based on single taxpayer brackets for 2016. Tax rates could be higher or lower, depending on other income and deductions attributed to the taxpayer.

Constance could more effectively provide for her brother by leaving non-taxable assets to him (e.g., cash or appreciated stocks, mutual funds or real estate, which assets receive a step-up in tax basis at her death).

Easy Steps – Making Gift is as Easy as 1,2,3

The process for choosing VHILA as a beneficiary of your Retirement Plan is simple:

Step 1. Order a Beneficiary Designation Form from your retirement plan administrator.

Step 2. Complete the form and include the VHL Alliance as beneficiary of part or all of your plan/account.

Step 3. Sign, date and send or deliver the form to your retirement plan administrator for processing.

You will receive confirmation that your plan administrator has accepted the form.

That’s all there is to it!

We hope that you will let us know so that we can thank you and invite you to become a member of the VHLA Legacy Circle.
Life Insurance Policies & Commercial Annuities

Life Insurance Policies and Commercial Annuities pass to the "designated beneficiary" after the death of the "insured" or the "annuitant," as applicable, the same way as retirement plans.

Step 1. Order a Beneficiary Designation Form from your life insurance company or annuity policy administrator.

Step 2. Complete the form and include the VHL Alliance as beneficiary of part or all of your policy.

Step 3. Sign, date and send or deliver the form to the life insurance company or policy administrator for processing.

You will receive confirmation that your plan administrator has accepted the form.

That’s all there is to it!

We hope that you will let us know so that we can thank you and invite you to become a member of the VHLA Legacy Circle.

VHLA Legacy Circle

All planned giving donors who have notified the VHL Alliance that they have included VH.LA in their wills, trusts, retirement plans, life insurance, and other planned gift arrangements are invited to join the VHLA Legacy Circle.

DISCLAIMER: The discussion herein is general in nature and may not apply to all individuals. Prospective donors are urged to consult their personal tax and financial advisors concerning the specific consequences of making gifts to the VHL Alliance.

Updated 2/20/2020