

Interested in learning more about planned gifts through the Eye & Ear Foundation? Please check all that apply and return to:

The Eye & Ear Foundation
203 Lothrop Street
Suite 251 EEI
Pittsburgh, PA 15213

Questions? Please call 412-864-1300

- Gifts of Cash
- Stocks, Bonds, Mutual Funds
- IRA Charitable Rollover
- Retirement Funds (403Bs & 401Ks)
- Charitable Gift Annuities
- Charitable Trusts
- Life Insurance Gifts
- Bequests

Contact Information

Name

Address

City/State/Zip

Phone

Email

EYE & EAR MISSION 2020

Be a part of the excitement and energy that's building around the Eye & Ear Foundation's boldest fundraising effort yet.

Eye & Ear Mission 2020 supports the development of innovative technologies and personalized treatments that will ultimately improve patient care and quality of life for people with diseases of the eye, ear, nose, throat, head and neck. The focus is on three key areas:

TRANSLATION

This phase brings ophthalmology and otolaryngology research advances from the laboratory to the clinic. Includes developing teams of scientists using biology, gene therapy, stem cells, and/or prosthetics.

INNOVATION

With support for innovation, surgeries will become less invasive, assessments of visual impairment, neurosensory impairment, and balance disorders will improve, and patient quality of life will be greatly enhanced.

PERSONALIZATION

By understanding genetics and the affects of aging on our senses, our scientists develop less toxic therapies tailored to the individual and enhanced with the use of better imaging tools and computer modeling, thereby improving patient care.

Your financial support is vital to the success of our mission.

Please consider at tax deductible donation at www.eyandear.org.



YOUR LEGACY

Planned Giving through the Eye & Ear Foundation of Pittsburgh

Making plans today so future generations can benefit from the scientific advancements is a wonderful way to leave a legacy. Planned Giving through the Eye & Ear Foundation of Pittsburgh is an investment in top-level physicians and scientists, cutting edge research, and the most advanced technologies for patient care.

Please see inside for details on ways to give.



WAYS TO GIVE

HOW IT WORKS

YOUR BENEFITS

CASH FOR ANNUAL FUND OR CAMPAIGN

- Your gift can be designated to a specific area of research or to an area of greatest need.
- You can *create a permanent endowed fund in your name or the name of a loved one.*

- Immediate tax deduction *up to 50% of your adjusted gross income.*
- See your gift working to benefit our work today.

STOCKS, BONDS, MUTUAL FUNDS

- Regardless of your cost basis, you can claim today's value as the gift and receive an income tax deduction without paying capital gains tax.

- *Immediate tax deduction up to 30% of your adjusted gross income.* Remainder can be carried over for five additional years.

IRA CHARITABLE ROLLOVER GIFT

- Those over *70 ½ years of age may make a gift from their IRA minimum distribution or from the IRA principal of up to \$100,000 per year* without claiming the gift as income.

- Unneeded assets can be used for immediate charitable needs of Foundation.
- Spouse can use his/her IRA to make a similar gift each year.

OTHER RETIREMENT FUNDS PRE TAX FUNDS: 403BS & 401KS

- Instruct your retirement plan custodian to distribute all or a percentage of these funds to the Eye & Ear Foundation after your lifetime.

- *Leave after tax funds to heirs.*
- Pre-tax fund assets can be left to the Eye & Ear Foundation with no estate or income tax consequences.

CHARITABLE GIFT ANNUITIES

- Provides income for life at a fixed rate based on your age. This donation/investment also *provides tax-free income* and an income tax deduction for you and another person. Can receive monthly, quarterly, semi-annual or annual distributions direct deposited to your account.

- Income for life based on your age when you establish the annuity.
- Immediate income tax deduction.
- Can use appreciated securities or cash for gift.
- Gift annuity provides tax free income.

CHARITABLE TRUSTS

- Lead Trust – make a significant gift to the Institute over a period of years, or for your life.
- Charitable Remainder Annuity Trust or Charitable Remainder Unitrust can provide a yearly *stream of income for the donor.*

- Remainder of the Lead Trust provides untaxed wealth for your heirs.
- Remainder of Annuity or Unitrust is left to the Foundation could *create an endowed fund.*

LIFE INSURANCE GIFTS

- Make the Eye & Ear Foundation the full or partial beneficiary of a paid-up or ongoing life insurance policy.
- Cash in an existing paid-up policy to make an outright gift or to create a charitable gift annuity.

- Gifts of life insurance pass outside your estate; no estate tax for heirs or charity.
- Policy taken out in name of charity provides tax deduction on premium payments.

BEQUESTS – THROUGH YOUR WILL OR LIVING TRUST

- Have your attorney make a provision in your will as follows: "I give, devise and bequeath \$__ (specify amount or % of estate or % of the remainder) of estate to: The Eye & Ear Foundation, 203 Lothrop St., Pittsburgh, PA 15213"

- *Own property or assets for life.*
- No estate tax on bequests to charity.
- *Government bonds may go to the Eye & Ear Foundation without being taxed.*