

ALL ABOUT BENEFICIARY DESIGNATIONS



The easiest way to make a legacy gift!

Did you know a beneficiary designation is among the simplest of all charitable gifts? It's true! It's as easy as filling out a form. You specify the charities you want to support and determine the percentage of the assets you want each beneficiary to receive.

By naming the Eye & Ear Foundation as a beneficiary of a retirement plan, bank account, life insurance policy, or other financial asset, you help fund groundbreaking research in the Departments of Ophthalmology and Otolaryngology at the University of Pittsburgh.

WHY CHOOSE A BENEFICIARY DESIGNATION GIFT?

- ✓ **SIMPLE** – No legal fees or changing your will
- ✓ **FLEXIBLE** – Change your beneficiaries at anytime
- ✓ **IMPACTFUL** – Any gift of any size makes a difference

“After undergoing surgery for mouth cancer in 2010, I am grateful to say that I have been cancer-free ever since. It was a positive experience since I lived to talk about it. When I learned about the work of the Eye & Ear Foundation, I was impressed by their mission and decided to make a planned gift through my estate.”

— *Dave Wagner*

EASY STEPS TO LEAVE A LEGACY

STEP 1 – Choose an Asset to Designate

- Retirement Account
(For tax reasons, often the best option)
- Brokerage Account
- Bank Account
- Life Insurance Policy
- Trust

STEP 2 – Request a Beneficiary Form

- Contact your account custodian or financial institution.
- Many offer online forms making the process quick and easy.

STEP 3 – Name Your Beneficiaries and Determine Amount

Include the Eye & Ear Foundation (Tax ID: 25-1439732) and decide what percentage or amount you would like to designate. Any amount is meaningful and appreciated!

FINAL STEP – Let Us Know

Making your wishes known helps us plan ahead and continue to fund the best possible research toward treatments and cures. We'd love to recognize your generosity, and if you choose, welcome you into the Foundation's Science & Solutions Legacy Society.

- Email: craig@eyeandear.org
- Website: eyeandear.org
- Scan the QR code on your mobile device.



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