

TAPE



The Foundation of the ATS  
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New York, NY 10006-2755

The Foundation of the ATS

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The Foundation of the ATS

*Help Us Help the World Breathe*

Research • Education • Training

<http://thoracic.foundation.org>

212-315-6464

TEAR

TEAR

# PLANNED Gifts

## GIFTS OF RETIREMENT ASSETS

When you name the Foundation of the ATS as the beneficiary of your IRA, 401(k) or other qualified plan, any residual left in your plan when you die passes to the Foundation tax free. For the latest information on making a gift of retirement assets, please consult our Web site at <http://thoracic.foundation.org>.

## CHARITABLE GIFT ANNUITIES

The charitable gift annuity offers payment rates well above prevailing interest rates yielded by certificates of deposit, money market funds and savings bank accounts. The payment rates are determined by donors' ages—the older the person, the higher the payment. A portion of each payment is tax free and donors are entitled to an immediate income tax deduction for the contribution they make.

## CHARITABLE REMAINDER TRUSTS

To establish the trust, donors may transfer cash, securities or other property. The trust makes payments to the donor (and spouse, for example) for their lifetime. When the trust ends, the principal passes to the Foundation. Donors receive an immediate tax deduction for a portion of their contribution to the trust and pay no capital gains tax on the appreciated assets they donated.

## CHARITABLE LEAD TRUST

To establish the trust, donors may contribute cash, securities or other property. The trust makes payments to the Foundation for a specific number of years, after which the remaining principal goes to the donors' heirs. Donors qualify for a gift tax deduction and savings on their estate taxes.



The Foundation of the ATS



# PLANNED Giving

*Help Us Help the World Breathe*  
Research • Education • Training

“Planned giving provides an opportunity to build the future of the ATS, while securing your own.”

- Gerard Turino, MD,  
Vice Chair, Foundation of the ATS  
Past President, ATS

As the philanthropic arm of the American Thoracic Society (ATS), the Foundation of the ATS works to support vital Society programs, including the **Research Program, Methods in Epidemiologic, Operations and Research (MECOR)** courses, **ATS Assembly projects** and **training and education initiatives**. To ensure that the ATS can meet its future programmatic needs, the Foundation encourages members, friends and supporters to make a commitment to its bequest and planned giving programs. Your support tells us that you share our vision of the future where lung disease no longer exacts its toll on individuals and families and that you believe in our mission “to advance the prevention [and] treatment of respiratory diseases, critical illnesses and sleep disorders.”

This brochure describes the different ways your investment in the future of the ATS can offer financial advantages to you, your family and your estate.

#### BEQUESTS: REMEMBERING THE ATS IN YOUR WILL

Your will is an enduring statement to the people, causes and institutions that you care about. Your will says you care enough to make your intentions clear. It leaves no doubt as to your priorities and your convictions. Wills are an important source of support for the ATS. They are often the largest and the easiest planned gift an individual can make. Because they are revocable gifts, they do not jeopardize your cash flow, standard of living or ability to meet future needs. To include the ATS in your bequest, please ask your attorney to write a simple codicil to your existing will.

**When including this provision in your will, please use our full legal name: The Foundation of the American Thoracic Society, a non-profit**

**501(c)(3) corporation.** You and your attorney can decide how you can make your bequest commitment. Provided below is sample language for your consideration:

- **Unrestricted Gift:** *A gift that can be used where the need is greatest.*

I give to The Foundation of the American Thoracic Society, Inc., a non-profit 501(c)(3) corporation, headquartered in New York City, NY, the sum of \$ \_\_\_\_\_ \* for its general purposes.

- **Gift for a Specific Purpose:** *A gift that can be designated.*

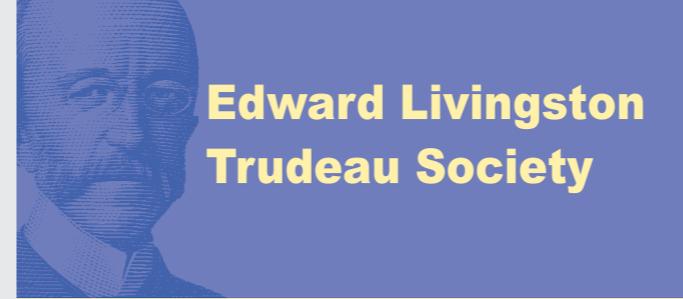
I give to The Foundation of the American Thoracic Society, Inc., a non-profit 501(c)(3) corporation, headquartered in New York City, NY, the sum of \$ \_\_\_\_\_ \* to be used for [state purpose].

**\*For additional bequest provisions, please visit our Web site at <http://foundation.thoracic.org>**

#### CREATIVE LIFE-INCOME GIFTS IN YOUR WILL

Donors may transfer cash, stock, real estate, artwork, IRAs, pension benefits and closely held stock, among other assets, to the Foundation through their will. There is no upper limit on the estate tax deduction that a donor can receive.

Many supporters also send us letters confirming their intention to make a bequest to the ATS. Besides ensuring that your wishes will be carried out, the bequest commitment letter enables the Foundation to recognize your gift and to discuss designation of your gifts. A sample letter of intent is posted on our Web site at <http://foundation.thoracic.org>.



## Edward Livingston Trudeau Society

Dr. Trudeau was a forward-thinking physician whose vision spurred the founding of the ATS, as well as its growth as a world-renowned leader in lung research and education over the last hundred-plus years. To recognize his distinguished achievements and honor those who share his vision, the Foundation of the ATS has established the Edward Livingston Trudeau Society. Society members form an alliance with others who share their compassionate vision for improving public health worldwide.

#### Members of the Edward Livingston Trudeau Society receive:

- A distinctive pin to show their commitment to the ATS;
- A block of ten Edward Livingston Trudeau U.S. Postal Service commemorative stamps; and
- A special Society contributor ribbon to be worn on their name tags during the annual ATS International Conference.

**To become a member**, please contact us and let us know that you have made an estate gift to the Foundation. Examples of such gifts are:

- Designating the Foundation as a charitable beneficiary in a will or trust;
- Naming the Foundation as owner and/or beneficiary of a life insurance plan;
- Indicating the Foundation as a beneficiary of a retirement plan account; and
- Funding a life-income gift with the Foundation as the charitable beneficiary.

When making a planned giving commitment to the ATS, please use our full legal name: The Foundation of the American Thoracic Society, a non-profit 501(c)(3) corporation.

#### PLEASE SEND ME:

- Information about how I could benefit from making a tax-free charitable rollover from my IRA or other retirement plan.
- Information about how to include the Foundation in my will.

#### I AM PLEASED TO INFORM YOU THAT:

- I have included the Foundation in my estate plans (as beneficiary named in a will, trust, IRA or other retirement plan) or other planned gift.\*
- I am considering including the Foundation in my estate plan or other planned gifts. Please contact me to discuss this further.\*

Name \_\_\_\_\_

Birth Date \_\_\_\_\_

Spouse's Name \_\_\_\_\_

Birth Date \_\_\_\_\_

Preferred Address \_\_\_\_\_

\_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_ Zip \_\_\_\_\_

Preferred phone number \_\_\_\_\_

Preferred E-mail \_\_\_\_\_

**\* All communications with us are confidential and do not obligate you in any way to the Foundation.**