



Today, we are finding new ways to improve the lives of millions of children and adults with diabetes. How? Donors who make a legacy gift to the American Diabetes Association Research Foundation are leaving a positive and lasting impression on diabetes.

Legacy gifts allow the ADA to fund research aimed at preventing and curing diabetes. These generous contributions also support research designed to help people with diabetes live longer, healthier, more normal lives.

We invite you to become a member of the **Summit Circle**, an honorary society for individuals who have made a planned gift to the ADA. *Leave a legacy.*

## YOU CAN MAKE A DIFFERENCE

### Why should I make a planned gift?

The American Diabetes Association is the nation's leading nonprofit health organization providing diabetes research, information and advocacy. *The mission of the ADA is to prevent and cure diabetes and to improve the lives of all people affected by diabetes.*

Have you stopped to consider how you can accomplish your personal and philanthropic goals? At the American Diabetes Association, we can present several opportunities that can save you money, increase your retirement income, provide income for your loved ones and support research that will find a cure for diabetes.

Throughout the years, legacy gifts from ADA donors have helped finance research that has brought major victories in understanding, treating and preventing diabetes. We see this continuing with your help. Your generous support will continue to build upon the knowledge and advances that have been inspired by others.

## WAYS TO GIVE

There are many ways to make a planned gift. Listed below are a few of the most popular techniques.

### Bequests

A bequest in your will or trust is a simple way to make a difference without affecting your current cash flow, and it ensures a valuable

estate tax deduction. You can either make a specific bequest of cash, securities, real property, including mineral interests, or bequeath a fraction or percentage of your estate's residue.

### Make the ADA a Beneficiary

You can name the ADA or the ADA Research Foundation as a beneficiary of your insurance or annuity policy, retirement plan, or Individual Retirement Account (IRA).

### Gifts That Pay

By establishing a charitable gift annuity (CGA), you can generate personal income. Our CGA will pay you (and a survivor, if desired) income when you make an irrevocable gift. Upon your death, your CGA account balance is transferred to the ADA.

**For ages 60 and above.** With a **Charitable Gift Annuity** you can secure fixed annual payments for your lifetime. The payment is determined by your age at the time of your contribution, with older donors receiving larger payments than younger donors. The rate you receive—once you make your gift—is locked in and remains constant throughout your lifetime. You will also receive an income tax deduction in the year you establish the Annuity, which may be “carried over” for up to five (5) subsequent years if not fully used in the first year.

**For ages 55 and above.** Consider a **Deferred Charitable Gift Annuity** to supplement other retirement benefits. You make the contribution now, securing a large current income tax deduction. We agree to make annual payments to you for life, starting at age 65 or older. This is advantageous particularly if your tax bracket is higher now than it will be later.

# LEAVE A LEGACY

## Charitable Remainder Annuity Trust

With a Charitable Remainder Annuity Trust you can place assets into a “split-interest” trust from which you receive a life income at a fixed amount. After your lifetime, and the lifetime of a surviving beneficiary, if desired, the trust remainder goes to the ADA or the ADA Research Foundation.

## Charitable Remainder Trust

The Charitable Remainder Trust works like an annuity trust, except that the income you receive varies each year based on a set percentage of the value of the trust assets.

## Charitable Lead Trust

You can set up a trust designating the ADA to receive a fixed annuity or fixed percentage of the trust assets for a term of years, with the remainder either reverting to you or to one or more individuals designated by you, and either accrue generous income or estate tax benefits depending on the form you choose.

## HOW TO MAKE A PLANNED GIFT

We can help you evaluate personal factors and make detailed calculations of income and tax benefits you will receive through a gift to American Diabetes Association or the American Diabetes Association Research Foundation. Please contact the Office of Individual Giving at **888-700-7029**, or **giving@diabetes.org**, for more information or complete and mail the form below to the:

**American Diabetes Association  
Office of Individual Giving  
1701 N. Beauregard Street  
Alexandria, Virginia, 22311**

## SUMMIT CIRCLE MEMBERSHIP

I am committed to the prevention and cure of diabetes and to improving the lives of all people affected by diabetes. Therefore, I have established a lasting legacy to the American Diabetes Association and/or the ADA Research Foundation by remembering the Association in the following way(s):

Will     Living Trust     Charitable Remainder Trust     Charitable Lead Trust     Charitable Gift Annuity\*

Retirement Plan     Life Insurance Policy     Other \_\_\_\_\_

\*Please send me a personalized charitable gift annuity proposal for  \$100,000     \$50,000     \$25,000     Other \$ \_\_\_\_\_  
(minimum \$5,000)

My birth date is: \_\_\_\_/\_\_\_\_/\_\_\_\_

I would like payments  quarterly     semi-annually     annually

Enroll me as a member of the Summit Circle of the American Diabetes Association.

Date: \_\_\_\_\_ Name: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone: \_\_\_\_\_ E-mail (optional) \_\_\_\_\_

We would like to include your name on our **Summit Circle** membership rolls to encourage other gifts and to celebrate your special support of our mission. Please print below how you would like your name to appear in our publications:

\_\_\_\_\_ or;

I prefer to remain an anonymous member of the **Summit Circle**:

