



INSPIRED GIVING

An Estate and Charitable Planning Guide for Friends of Glaucoma Research Foundation | Vol. 16 Spring 2024

A Tax-Smart Way to Advance Glaucoma Research

Glaucoma Research Foundation President and CEO, Thomas Brunner, has made generous annual contributions since joining the staff in 2003. Tom notes: “I truly believe in our mission and feel it is critical for me to lead by example by making a meaningful gift each year. My gifts are an investment in a future free from glaucoma.”

In addition to Tom’s deep and ongoing commitment to Glaucoma Research Foundation’s work to restore vision and find a cure, he is also mindful of tax-smart ways to contribute. Currently, both he and his wife, Wallace, make yearly gifts through their IRAs. “Utilizing our IRAs to make charitable gifts makes great economic sense for us as the distributions we direct to Glaucoma Research Foundation are not subject to income taxes,” Tom adds. “It allows us to make more significant contributions each year to support our innovative research programs and patient education initiatives.”

Known as the IRA charitable rollover or qualified charitable distribution (QCD), individuals 70½ years of age or older can give up to \$105,000 per year without having to pay income taxes on the

funds distributed. Also, beginning the year you turn 73, you can use your QCD to satisfy all or part of your required minimum distribution (RMD). Since you do not pay income taxes on the gift, the transfer generates neither taxable income nor a tax deduction, so donors can benefit even if they do not itemize their deductions.

Tom adds: “No matter your age, you can designate Glaucoma Research Foundation as the beneficiary of all or a percentage of your IRA. Retirement assets are an excellent way to support causes important to you since they pass tax-free after your lifetime.”

If you are inspired to help create a future free from glaucoma, there are many ways you can make a gift to fund innovative research to find a cure without giving up assets you may need today.



Tom Brunner with his granddaughter

To become an integral part of Glaucoma Research Foundation’s future, contact Nancy Graydon at ngraydon@glaucoma.org or 415-986-3162 ext. 231 for more information.



Building Your Legacy: Smart Choices for Your Stage of Life

The things you care about most can shift as you journey through life. As you grow and change, you can use our road map to help you make smart choices—no matter your season of life!

In your 50s

You may be considering whether your investments and savings will carry you through retirement. Many dedicated partners like you also start to think about deepening their commitment to curing glaucoma around this time.

Choose Your Best Approach

- **Preserve your values through your will or living trust:** With as little as one sentence, you can share your unwavering support of a future free from glaucoma with generations to come. Whether you give a set amount or a percentage of your estate, your kindness will have an extraordinary impact on everyone affected by glaucoma.
- **Set up a donor advised fund (DAF):** This popular option is like a charitable savings account and may come with tax benefits. You can use it to make an immediate impact by recommending a grant to us now, or to make future or recurring grants.

In your 60s

Does your estate plan reflect any life changes, such as retirement, an empty nest or caring for your parents? Now is a great time to review your important documents to ensure they align with your current situation and your long-term goals. Like many others, you may want to consider creating a gift that boosts your income *and* your investment in our mission.

Choose Your Best Approach

- **Establish a gift that pays you income:** You have several options to create a steady stream of lifetime income for yourself or a loved one. What's left of your gift will help restore vision through innovative science.
- **Name us as a beneficiary:** Your retirement plan or a life insurance policy you no longer need can easily be transformed into an impactful gift that costs you nothing today. You can contact your plan administrator to get started or complete an online form.

In your 70s

Are you looking for meaningful ways to give back? Consider volunteering your time to support your community and causes you love. You also have many financial options to choose from that help extend your kindness *and* your budget.

Choose Your Best Approach

- **Make a difference today with your IRA:** If you are 70½ or older, you can give any amount up to \$105,000 from your IRA directly to Glaucoma Research Foundation without having to pay income taxes on the money.
- **Boost your income with a legacy IRA:** Did you know you can establish a gift that pays you fixed income for life using a one-time distribution of up to \$53,000 from your IRA? Special rules apply, so contact us to see if this option is right for you.

In your 80s, 90s and beyond

Think about how you would like to be remembered. Consider making or repeating any of the gifts mentioned to continue growing your love for our dream to bring an end to a disease that steals precious vision. Do what makes you happy—you've earned it!

Choose Your Best Approach

- **Create a legacy letter:** Preserve your life story and express your eternal values through a written letter or recording that your loved ones will treasure.
- **Share your plans:** If you choose to carry on your compassion through any of these legacy gifts, would you please let us know? That way, we can take the necessary steps to ensure we fulfill your wishes. Plus, it would be our honor to thank you for your kindness!

What Is Right for You?

We are ready to help you explore which giving options best fit your personal circumstances. Please contact Nancy Graydon at ngraydon@glaucoma.org or 415-986-3162 ext. 231 to get started!



Give Your Loved Ones Peace of Mind

You can provide a road map for your loved ones that will help them honor your wishes and avoid undue stress. Our FREE brochure, ***For My Loved Ones: My Important Information***, will help you get started. Request yours by returning the enclosed reply form.



Show Your Love for Your Family

A Will Isn't Just a Piece of Paper—It's a Piece of You

When you think of the word “family,” what comes to mind? Or rather, who?

Maybe biological relatives. Perhaps stepparents or stepchildren. Lifelong friends. A faith community. Advocates for a common cause.

Whether you're connected by biology, geography, shared values or simply love, one thing is constant: Your family comprises people you care about and want to protect.

One of the most meaningful ways to protect that family is through your will. It's more than a set of documents outlining who gets your stuff—it's a lasting reflection of your love.

When you spend time considering and documenting how you want your possessions distributed, they become something much bigger: a legacy. Your care extends far beyond your lifetime. Your love lives on.



An Even Greater Legacy

Your plan also gives you the power to provide for the organizations you care about. Your caring commitment to speeding the cure for glaucoma and restoring vision can be part of your legacy.

If you choose to include Glaucoma Research Foundation in your will, your kindheartedness will allow us to give the gift of sight for years to come. Your connection to our mission goes beyond the present and becomes a part of you forever.



We are so grateful you are part of our community and would be pleased to speak to you about the many ways you can show your love for all those impacted by glaucoma through your estate plan. Contact Nancy Graydon today for assistance.

GLAUCOMA
RESEARCH FOUNDATION
www.glaucoma.org/legacy

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If you do not wish to receive planned giving information from Glaucoma Research Foundation, please email development@glaucoma.org or call 1-800-826-6693.

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