



INSPIRED GIVING

An Estate and Charitable Planning Guide for Friends of Glaucoma Research Foundation | Vol. 18 Spring 2025

Amplify Your Impact

Making a difference doesn't have to be a one-time experience. It also doesn't have to come in the form of a check. Here are some today and tomorrow ways to make scientific breakthroughs possible. You can feel the joy of helping people today while ensuring we have the resources we need to serve future generations.

What Advantages Does Each Have?

The **Impact Today** choices may provide tax advantages depending on the type of gift you make. You qualify for an income tax deduction for your gift. And in the case of appreciated assets, you may receive additional tax benefits and eliminate capital gains taxes if you've owned the assets for more than one year. If you are 70½ or older, you can make a tax-free gift directly from your IRA.

The **Difference Tomorrow** choices include some in which you can give just a percentage to ensure that your loved ones are taken care of, too. You can also change your mind and adjust your decisions as your situation changes. Some gifts, such as designating a beneficiary for your life insurance or retirement plan account, can be completed directly through your provider and do not require the time and resources of involving an attorney.

Do More Than You Imagined

See the impact you can make at Glaucoma Research Foundation. Contact Nancy Graydon at (415) 986-3162, Ext. 231 or nancy@glaucoma.org to learn more.

Make an Impact Today

- Monthly contribution
- Stock or appreciated assets
- Donor advised fund
- Vehicle donation
- IRA distribution

Make an Difference Tomorrow

- Gift in your will or living trust
- Retirement plan assets
- Bank or brokerage accounts
- Life insurance policies
- Beneficiary designation of IRA



Your Family, Your Wishes

Everyone defines “family” differently. No matter what yours looks like, creating your estate plan can make your love for them last forever. Here are four vital steps to take for you and them:

1. Make a Will—Today

A properly executed will or living trust (see facing page) will speak powerfully for you after your lifetime. If you have a complex estate and/or family situation, a qualified estate planning attorney can ensure that your plan covers all the bases. Without a plan, the state where you reside will distribute your assets—regardless of your desires.

2. Update Your Beneficiaries

Your will or trust doesn't cover assets such as retirement plans, life insurance policies, donor advised funds and commercial annuities. You fill out separate beneficiary forms to determine who receives them. Review those names every two or three years to ensure they reflect your current wishes.

3. Create or Update Powers of Attorney

An updated and properly executed financial power of attorney, health care power of attorney and advance directive form are critical parts of any estate planning process. You can name a trusted individual to make financial and health care

decisions for you in the event you are unable. You can create these documents when you set up your will or living trust. Then keep the original in a safe place and give your authorized person a copy.

4. Make Your Wishes Crystal Clear

Have face-to-face discussions or phone calls with those you name as guardians of minor children or pets. Include a statement or legacy letter in your will or trust that explains decisions such as leaving a legacy gift to a nonprofit in honor of a loved one.

To learn more about how you can pay tribute to an important person in your life through your estate, see *back page*.

We're Here to Help

The legacy giving team at Glaucoma Research Foundation has experience helping people in a variety of family situations include us in their plans. Contact Nancy Graydon at (415) 986-3162, Ext. 231 or nancy@glaucoma.org today to discover your options!

Do You Need a Trust?

Should you have a will? Absolutely.

Should you also have a trust? Maybe.

A revocable trust, also known as a living trust, offers a more comprehensive approach to managing your assets during your lifetime and distributing them after your passing.

Reasons You May Want a Trust

1. Protect your privacy. A will becomes a public record upon probate, which is a court-supervised process to administer an estate. Assets placed in trust, however, bypass probate. This allows you to keep your matters private.
2. Plan for incapacity. You can appoint a successor trustee to step in and manage the trust on your behalf should you become unable to do so.
3. Ensure management of a complicated estate. If you own complex assets or real estate in more than one state, a trust can help streamline the management and distribution of these assets.

What Should You Transfer Into a Trust?

Essentially, any asset that you want to protect, manage and distribute can be placed into a trust. This could include real estate, bank or investment accounts, or business interests.

Who Manages the Trust?

A trustee is responsible for managing the trust assets. You can name yourself, a trusted friend or a financial institution as trustee.

Think a trust might be for you? If you would like personalized guidance setting up a trust, a qualified estate planning attorney can help.

Making a Gift to Glaucoma Research Foundation Is Easy

In as little as one sentence, you can include a gift to Glaucoma Research Foundation in your will or trust and make a long-lasting impact. We're happy to answer any questions you may have as you consider this option.

Wills vs. Trusts: Know the Difference

	Will	Trust
Probate and privacy	Subject to probate; your will becomes public record in these proceedings	Provides faster, more private distribution of assets by bypassing probate; all details remain confidential
Asset management and distribution	Specifies how assets are distributed after your lifetime	Outlines asset management and distribution during and after your lifetime
Control over distribution	Limits control over timing and method of distribution	Allows for greater control over timing, method and conditions of distributions
Executor/trustee	Requires appointment of an executor or personal representative to administer the will	Requires appointment of a trustee to manage trust assets
Incapacity planning	No instructions for managing assets in the event of incapacity	Trustee will manage your assets if you are unable to handle your financial affairs
Costs	Generally lower initial cost compared to trusts	Likely to have higher initial cost but can offer potential savings by avoiding probate

A Perfect Way You Can Honor Someone Special

On your life's journey, who has inspired you?

Few of us find success and happiness on our own. We rely on the encouragement of others, including family, friends and mentors. Maybe some of these important people even connected you to the causes you cherish today.

If someone in your life inspired your commitment to our quest for a cure, what better way to honor them than by attaching their name to something that will celebrate their legacy of kindness?

Create a tribute gift to Glaucoma Research Foundation in your special person's name and you will:

1. Publicly honor the important role they played in your life
2. Further our efforts to change the course of glaucoma care
3. Possibly enjoy tax benefits

You can give Glaucoma Research Foundation a gift in someone's honor today or in the future.

- A gift today could fund our immediate needs or an upcoming project, giving you and your hero, if they are still living, a chance to see your generosity in action.
- Through a future gift, like a gift in your will or through a beneficiary designation, you can honor your inspiration without affecting your finances today.



How Can You Start Honoring Your Hero?

Our FREE guide, ***Give From the Heart With a Tribute Gift***, shows you how to put your feelings of gratitude into action, providing details on the many gift options you have. The guide even explains a way you can honor your special person *forever!*

[Request your FREE guide today to learn more. Simply complete and return the enclosed reply form.](#)

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RESEARCH FOUNDATION

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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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