

The AATS Foundation invites you to create a lasting legacy which will greatly impact the future of thoracic and cardiovascular surgery.

How Do I Create an Estate Plan?

- Create a list of all your assets – such as real estate, bank and investment accounts, personal collections, jewelry, cars, boats, etc...
- Decide who will receive your assets – your family, other loved ones, and the causes important to you. Assign specified amounts or percentages to each beneficiary and by designating residuals to specific causes you wish to support.
- Depending on whether you have a will or living trust, choose your executor or successor trustee, who will be responsible for seeing that the terms of your will or living trust are carried out in full.
- Execute powers of attorney that name the person(s) who will make healthcare and financial decisions for you if you become incapacitated.

Risks of Not Having an Estate Plan

- It may be more costly to not have a plan than it is to make one.
- You may end up “disinheriting” the very people you want to protect and provide for.
- In cases where a plan is nonexistent, a court generally handles the distribution of assets. Your assets will be distributed without consideration of your lifetime priorities and commitments.

When Should a Plan be Revisited?

You may wish to revisit and revise your estate plan in the following instances:

- Family members have passed away or your wishes have changed
- New family members are present (birth, adoption)
- Marriage or divorce
- New federal and state laws
- Change in guardians, executors, or trustees
- A substantial increase or decrease in the value of your assets
- The sale, purchase, or loss of a significant asset
- It has been 3-5 years since you reviewed your estate plan

This information is not intended as legal, accounting, or other professional advice. For assistance in charitable planning, please consult an attorney for legal guidance or obtain the services of another qualified professional.



Suggested Language:

If you would like to continue your support for the AATS Foundation by providing a gift in your will, please consider using the following language:

“I give, devise, and bequeath to the AATS Foundation (Tax ID #23-7288866), located at 800 Cummings Center, Suite 350-V, Beverly, MA 01915 the sum of \$_____ (or a description of the specific asset), for the benefit of the AATS Foundation for its general purposes.”

Or, if you prefer to provide a gift of the remainder of your estate after listed beneficiaries in your will, please consider including:

“I designate residuals of the estate, if any, to the AATS Foundation.”

Thank you for your generosity, we are grateful for your dedication in supporting the education and research of cardiothoracic surgeons.

For more information regarding leaving your legacy via the AATS Foundation, please contact AATS Foundation Director, Katie Federico, CFRE, at kfederico@aats.org or 978-252-2200 Ext. 544.

Mailing Address:

800 Cummings Center, Suite 350-V
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aatsfoundation.org