



Gifts of Insurance and Retirement Assets

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

Donations of insurance and retirement assets to the AATS Foundation ensure your unused funds are being used to support the research and education of cardiothoracic surgeons for generations to come.

Example Gifts Include:

- Appreciated real estate
- Home or vacation properties
- Undeveloped land
- Farmland
- Ranch or commercial property
- Life insurance policies

Gifts of Retirement Assets:

Individuals choose to name the AATS Foundation as a beneficiary of a retirement plan to reduce their taxes and support a mission in which they strongly believe. A full 60-70% of your retirement assets may be taxed if you leave them to your heirs. Instead, you can use your retirement assets to create your legacy gift, which is not taxed when receiving retirement benefits and can leave your loved ones assets like real estate and stock.

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
Beverly, MA 01915
aatsfoundation.org

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.



Benefits:

- Avoid potential estate tax on retirement assets
- Allow your heirs to avoid income tax on any retirement assets funded on a pre-tax basis
- Receive potential estate tax savings from an estate tax deduction

Gifts by Insurance:

Making a gift of insurance to the AATS Foundation is another great option to consider.

Benefits:

- Receive a charitable income tax deduction
- Receive additional tax deductions by making annual gifts so AATS Foundation can pay the premiums necessary to retain the policy to maturity

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.”