

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

Popular Legacy Gifts

Gifts by Bequest:

Name the AATS Foundation as a beneficiary in your will or trust, designating the gift of your choice (such as cash, real estate, personal property, or securities). Allows you to maintain control of your assets during your lifetime and can save on income taxes, capital gains taxes, and estate taxes.

Gifts by Beneficiary Designation:

Request a change of beneficiary form from the company holding your assets (such as IRAs, 401(k) and other retirement plans, bank accounts, commercial annuities, life insurance policies, and other assets) and include the AATS Foundation as a full or partial beneficiary. Allows for reduction in income taxes and possibly estate taxes for loved ones.

Benefits to You:

- Naming the AATS Foundation through a bequest in your will or trust costs you nothing now, but will ensure your lasting legacy and support of future generations of cardiothoracic surgeons.
- With most gifts, you can change your mind at any time and are not locked into any decisions you make today.
- There is no minimum gift required. Every gift makes a difference, and no gift is too trivial.

Stewards of Your Legacy:

- Please let us know about your gift so we can thank you for your generosity and foresight.
- We will respect your privacy. Your gift will remain anonymous unless you tell us otherwise.
- We will use your gift in the way you intended.
- You can change your plans and/or beneficiaries at any time.
- We will continue to meet the highest standards of financial transparency in order to remain trusted stewards of your legacy gift.

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 Bequest Language:

The following language may help you and your attorney when drawing up a bequest that meets your needs:

“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.”

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