

Join the **PRF** *Legacy Society*



## Make an Even Greater Impact Toward the Cure by Making a Planned Gift

You have shown your *steadfast commitment* to The Progeria Research Foundation (PRF) and unwavering support for our mission. **Thank you** for making a vital difference in the lives of the inspiring children and young adults with Progeria.

Now you can **make an even greater impact** by including PRF in your will, or naming PRF as a beneficiary of your retirement plan or insurance policy. The **PRF Legacy Society are forward-thinking individuals who are committed to curing children and young adults with Progeria and to securing PRF's future** by making a planned gift, Society membership allows you to fulfill your financial and philanthropic goals, while also supporting PRF's quest to cure Progeria. And because Progeria has a biological connection to heart disease and the aging process, your gift may also impact your family and millions of aging adults. **A true legacy.**



### DID YOU KNOW...

Without proper planning, more than half of your estate could be taken by the government at your death, thus depriving your family of valuable assets.

40% of adults pass away before drafting (or updating) a will or otherwise planning for the disposition of their assets, leaving families at the mercy of the courts to decide who gets what.

There are 3 easy ways you can make a lasting impact for children and young adults with Progeria and still enjoy assets you might need during your lifetime:

### DESIGNATE PRF A BENEFICIARY IN YOUR WILL

A will is the most popular way to make a future gift. Your will can include a gift of a stated dollar amount, specific property, a percentage of your estate, or the remainder after distributions to others. The following provisions are suggested language when consulting with your legal advisor:

- For a general bequest of a dollar amount: I devise and bequeath the sum of \$XXX to The Progeria Research Foundation for its general use and purposes.
- For a specific bequest such as stocks or bonds, real estate or personal property: I devise and bequeath XXX (name of specific security and number of shares, description and location of real or personal property) to The Progeria Research Foundation for its general use and purposes.
- For a percentage bequest: I devise and bequeath X% percent of my estate after payment of debts, taxes and expenses to The Progeria Research Foundation for its general use and purposes.
- For a remainder bequest after specific gifts are made to others: I devise and bequeath the remainder and residue of my estate after payment of debts, taxes and expenses to The Progeria Research Foundation for its general use and purposes.

*PRF Legacy Society member  
John Marozzi with his  
granddaughter Zoey.*



### BENEFITS OF HAVING A WILL

- Provides for your family after your death.
- Allows you to distribute your assets according to your wishes.
- Can save on estate taxes the government would otherwise take.
- Lets you leave a legacy to PRF without giving up assets now.

### DESIGNATE PRF A BENEFICIARY OF YOUR LIFE INSURANCE POLICY

A life insurance policy can allow you to leave a legacy—not just for the people you love but for organizations and causes that are important to you. There are two ways that a gift of this type could be a practical and generous way to support PRF:

- Designate PRF as the primary or contingent beneficiary of either 100% or some percentage of the proceeds from the policy; or
- Transfer ownership of the policy and either pay for the policy in full or continue making premium payments. The transfer is a present gift for which a charitable tax deduction may be taken; continued premium payments are a charitable tax-deductible contribution.

Contact your life insurance company for the forms to name PRF as a beneficiary.

### DESIGNATE PRF A BENEFICIARY OF YOUR RETIREMENT ASSETS

Did you know that your retirement plan assets may face multiple taxation for your heirs? When thinking about your estate plan and making the right choices for your family, please consider donating all or part of your retirement assets, such as your IRA, 401k, 403b, pension or other tax deferred plan.

Contact your plan's administrator for the forms to name PRF as a beneficiary, and/or to make a Qualified Charitable Distribution to PRF from your IRA.

Please include the following identifying language when designating PRF as a beneficiary of your will, insurance policy or retirement plan: The Progeria Research Foundation, Inc. is a non-profit corporation, organized and existing under the laws of the Commonwealth of Massachusetts, Tax Id #04-3460220

### BENEFITS

- Charitable deduction when you assign PRF ownership
- Security for your family by naming PRF contingent beneficiary
- Reduction in estate taxes because proceeds are removed from your estate.

### DID YOU KNOW...

Donating retirement plan assets may avoid income and estate taxes.

If you're 70½ or older, you can make a qualified charitable distribution (QCD) of up to \$100,000 per year from your IRA. No income tax is owed on the QCD leading to tax savings. A great way to make a significant gift now!

## **What happens to my planned gift when Progeria is cured?**

What a momentous day it will be when Progeria is cured! But PRF's work does not end there. Why?

- There are substantial manufacturing and other costs associated with ensuring the cure is available to every child and young adult with Progeria throughout the world.
- We will always need to find those with Progeria. Our global awareness and outreach efforts will need to continue, thus resources must be available to support this objective.
- Our focus on PRF's other mission - to treat and cure Progeria's aging-related conditions, including heart disease – will continue with the same commitment and passion we have for Progeria.

## **Would you give more if you could?**

Planned giving begins with this question. By making a planned gift to PRF, you are helping to save the lives of these remarkable children – something we know you care about – and possibly help the entire aging population. With planned giving, you may be able to give more, and your assets ultimately support a cause that's important to you.

Information provided here is intended to help you make thoughtful decisions when considering a planned gift, and we welcome the opportunity to work with you to ensure a lasting legacy. It does not represent legal, tax or professional advice. It is recommended that you consult your own legal, tax and/or financial advisors.

For questions about how planned giving supports PRF's mission, language to include in your will or trust, or to learn more about the benefits of joining the PRF Legacy Society, please contact: Audrey Gordon, Esq., Executive Director at 978-535-2594, email [plannedgiving@progeriaresearch.org](mailto:plannedgiving@progeriaresearch.org) or visit <https://www.progeriaresearch.org/planned-giving/>

**If PRF is already in your estate plans, thank you so much!  
Please let us know, so you can be part of the PRF Legacy Society.**

**Create a Legacy Today and Together, We *WILL* Find The Cure!**

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