



American Heart Association®

# Ways to Give

## Giving to the American Heart Association and American Stroke Association

Thank you for your consideration in making a gift to support our mission of building healthier lives free of cardiovascular diseases and stroke. Your heartfelt generosity, either through an outright gift or donor advised fund, will make a difference and help save lives. There are many ways to make a gift to show your support, while taking care of yourself and your loved ones.

**Our Mission Advancement Team can assist you in choosing the gift option that is right for you, and answer your questions on gifts donated over time.**



### GIFTS BY CASH, CHECK OR CREDIT CARD

Donations given through any of these methods can be done easily, conveniently and securely.

### ACH AND WIRE TRANSFERS

ACH (Automated Clearing House) and wire transfers are gladly accepted by the American Heart Association.



### DONOR ADVISED FUNDS

Donor advised funds may give our donors the ability to decide which areas of our mission they want to fund. If you plan to use a donor advised fund to make your gift, please talk with your mission advancement team member.

### ESTABLISH AN AMERICAN HEART ASSOCIATION DONOR ADVISED FUND PROGRAM

The American Heart Association's donor advised fund is like having an efficient charitable savings account. If you don't have a pre-existing fund, discuss the multiple ways that a fund can be created with the association to meet your tax, financial and philanthropic goals. This donor advised fund is simple to set up and flexible to meet individual needs.

### IRAs

IRAs are a popular way of making gifts to the American Heart Association.



### WILL OR TRUST

Through a will or trust, you can plan for a future gift to the American Heart Association while also ensuring your loved ones will also receive benefits.



### STOCKS, BONDS & MUTUAL FUNDS

Investors can contribute marketable securities that have been owned for more than one year and have grown in value.



### LIFE INSURANCE

If you have a life insurance policy that is no longer needed, you can transfer ownership of the policy to support our mission. If you choose to keep your policy but want to make a future gift, you can leverage your policy simply by naming the American Heart Association as a beneficiary.



### CHARITABLE GIFT ANNUITIES

Charitable gift annuities can provide you with a way to maintain your current lifestyle, and increase your financial security. You will receive fixed annual payments for as long as you live, and your gift will make a difference for our mission.

### CHARITABLE LEAD TRUST

With a charitable lead trust, you can donate to the American Heart Association, and then pass your assets to your heirs at reduced tax rates. You can fund your trust with cash, bonds, stocks, land or other assets.



For more information, contact [mission.advancement@heart.org](mailto:mission.advancement@heart.org), or visit [heart.org](http://heart.org).

The American Heart Association cannot provide tax advice. Donors should consult with their financial advisor for answers on tax-related questions.



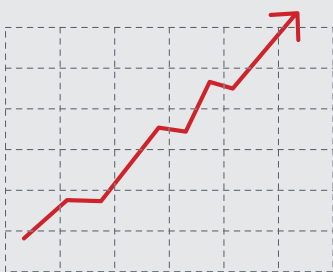
American  
Heart  
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# Appreciated Assets

## Opportunities for Tax-Wise Giving

Thank you for considering supporting the American Heart Association. Our donors choose to support our life-saving mission in a variety of ways - many that help meet their philanthropic goals, organize their giving, provide immediate tax deductions, and more.



### APPRECIATED STOCKS, BONDS AND MUTUAL FUNDS

Investors can contribute marketable securities that have been owned for more than one year and have grown in value.

- **A Greater Impact:** Your gift and tax deduction equal the fair market value of the stock on the day of transfer to charity. With appreciation, your impact is far greater than what you originally paid for the stock/mutual fund.
- **Tax Benefits:** Potential for tax savings on capital gains
- **Easy To Transfer:** The AHA provides simple instructions that make stock and mutual fund transfers quick and efficient.

### IRA CHARITABLE ROLLOVER

(also known as Qualified Charitable Distribution or QCD)  
IRAs are a popular and simple way to make a gift.

- **Easy To Transfer:** At age 70½ you can transfer up to \$100,000 directly from your account to a qualified non-profit.
- **Meet Your RMD:** The distribution counts toward your required minimum distribution (RMD).
- **Tax Benefits:** You do not pay tax on the distribution.

### DONOR ADVISED FUND (DAF)

A donor advised fund (DAF) is a unique tool that allows a donor to make a gift and recommend grants to IRS-qualified public charities, while being eligible for an immediate tax deduction.

- **Support A Cause You Are Passionate About:** Make grant recommendations to the association and other qualified charities at any time
- **Options That Meet Your Giving Needs:** A wide variety of cash and non-cash assets are accepted
- **Tax Benefits:** Eligible for immediate income tax deduction, plus possible avoidance of capital gains tax on appreciated assets



## THE AMERICAN HEART ASSOCIATION DONOR ADVISED FUND PROGRAM

If building a legacy of healthier lives is important to you and your family, consider establishing a donor advised fund with the American Heart Association. The benefits of the American Heart Association DAF Program include:

- **Fund Causes You and Your Family are Passionate About:** You have the opportunity to provide grants to other IRS-qualified public charities, in addition to the American Heart Association, through this same account.
- **Socially Responsible Investing Options:** 100% tobacco free equity option available
- **Make Decisions As A Family:** You can involve your children in your charitable decisions.
- **Keep Your Current Advisor:** You can keep your current financial advisor to manage these funds.



The American Heart Association does not provide tax advice. Donors should consult their tax and/or financial advisors, as each individual's tax situation may vary.

