



Legacy Gift of Retirement Assets

Naming the Alliance for Children's Rights as a beneficiary of your retirement account can be an attractive option for creating your legacy of lifting up children and families impacted by the child welfare system while reducing income and possibly estate taxes for your loved ones.

Retirement plans are among the most highly taxed assets in an estate when passed to family members — up to 37% of the assets may be lost to income taxes as well as subject to estate tax. This means, for example, that a \$100,000 IRA will be worth only \$63,000 or less when your loved ones receive it*. Naming the Alliance as a beneficiary of your retirement assets generates no income taxes. The Alliance is a tax-exempt organization and eligible to receive the full amount, bypassing any income or estate taxes. This means, for example, that a \$100,000 IRA given to the Alliance will be worth the full \$100,000.

Benefits:

- Continue to take regular withdrawals during your lifetime. Beneficiary designations only take effect upon death.
- After your lifetime, funds pass to the Alliance free of taxes.*
- A beneficiary designation can be amended if you or your family's needs change.

Simple Steps to Make Your Gift:

1. Contact your retirement plan administrator, bank, or financial institution for a change-of-beneficiary form. You may be able to request or download your form from your online account portal.
2. Decide if you would like to name the Alliance as a primary or secondary beneficiary, and the percentage you'd like us to receive. When you designate us as a secondary beneficiary, we receive the gift only if your primary beneficiary doesn't survive you.
3. Be sure to include our legal name and Tax ID Number.
4. Please let us know. Sharing your wishes now helps ensure your gift will be distributed as you intended.

Please use this information to fill out your beneficiary form:

Alliance for Children's Rights
4525 Wilshire Blvd. Ste. 150
Los Angeles, CA 90010
Tax ID# 95-4358213

We truly appreciate every gift and your legacy to create brighter futures for young people. For more information, contact:
Kerri Seibly, Chief Development Officer at
give@alliancecrr.org or 213.401.0945