Legacy Planning

With Amref Health Africa
what is legacy giving?

Legacy or Planned Giving is the process of making a significant charitable gift during a donor’s life or at death that is part of their financial or estate plan.
Questions for Thought

What is most important to you?  
What change do you want to see in the world?
The Benefits of Planned Giving
How Planned Giving Benefits You

“If you can see it happening in your lifetime, it might be too small of a dream”

-Ann Hunt

• It gives you peace of mind knowing you are supporting people and causes that you care about

• You align your legacy with what you love

• Reduces tax consequences
How Planned Giving Benefits Your Family

“Death brings out the best and the worst in families.”

-Families across the country

• Having a plan while of sound mind and body helps reduce arguments later.

• Updating your Giving Plan as your family grows, or as things change, helps ensure that your plans are executed the way you intended.
How Planned Giving Benefits Us

“Creating Lasting Health Change from Within!”

- Amref Health Africa

• Helps secure our future
• Enables greater mission Impact
• Biggest return on investment
• Makes your current annual giving perpetual
Our Planned Giving Options
Gifts of Stock

By making a gift of stock, you not only help us achieve our vision of lasting health change in Africa, but you can also receive the following benefits:

- Avoid capital gains taxes
- Deduct the fair market value of your transferred stocks from your income

These benefits effectively decrease the cost to you. Shares of stock may be delivered via electronic transfer or mail delivery. For more information or to make a gift of stock, please consult your financial advisor/attorney and contact:

- Jenny Peck, Senior Manager, Development, (212) 768-2440, Legacy@amrefusa.org

In order for us to identify your generous gift and issue a tax receipt, please be sure to inform us. Privacy laws discourage brokerage firms from releasing the names of clients, so, if you don’t let us know, we will have trouble crediting and thanking you for your generous gift. Please provide the following information with your gift of stock:

- Name of securities & number of shares
- Brokerage house/accounting firm and contact name
- Your address, phone number, and email address
Making a Bequest

The simplest method of planned giving is to leave a bequest in your will. A bequest is a written intention that a certain amount of money or property will be given to Amref Health Africa at your passing. Bequests are not subject to estate tax, so 100% of the gift will go towards our work.

The official legal bequest language is:

“I, [name], of [city, state, zip], give, devise, and bequeath to Amref Health Africa, 224 W 35th St, Ste 500 #237, New York, NY 10001 [written amount or percentage of the estate or description of property] for its unrestricted use and purpose.”

Our federal tax EIN is 13-1867411.

Please contact your lawyer or life plan consultant for more information on bequests, or contact us below, we are happy to help:

• Jenny Peck, Senior Manager, Development, (212) 768-2440, Legacy@amrefusa.org
Retirement Benefits

As a tax-exempt organization, Amref Health Africa can benefit from 100% of a gift, unlike a non-charitable organization beneficiary who would be responsible for estate and income tax on your IRA.

To guarantee your savings go the furthest, designate Amref Health Africa as your retirement benefits beneficiary today.
Retirement Benefits:  
Example with and without Retirement Plan Gift

Assume you have a retirement plan valued at $10,000, and a bank savings account also valued at $10,000. You want to leave $10,000 to your favorite charity. Whether you leave the charity the retirement plan or the savings account makes no difference to the charity: The charity is able to keep the full $10,000 either way, since no income tax applies to the receipt of a retirement plan or a savings account by a charity.

If you leave the $10,000 savings account to an individual such as your child, your child will receive the full $10,000 without a reduction for income tax. However, if you instead leave the $10,000 savings account to the charity and leave your $10,000 retirement plan to your child, your child will end up with less than $10,000, since income tax must be paid on retirement plan distributions received by an individual. The portion of the funds that your child loses to taxes could be substantial, depending on his or her income tax bracket and how quickly the funds are distributed from the retirement plan.
Life Insurance

To make Amref Health Africa a beneficiary of your life insurance proceeds upon your passing, simply ask your life insurance agent for a change of beneficiary designation form.

As with a direct bequest, Amref Health Africa can be a beneficiary of a specific amount, a percentage, or the remainder of shares after other beneficiaries in both cases.
We know that the time surrounding the writing of and arranging of wills is often challenging. We promise that at Amref Health Africa, we will be honest, helpful, and sensitive to this process and ensure your legacy is enduring and to your standards.
Contact Information

To learn more or if you have any questions, contact:

Jenny Peck, Senior Manager, Development
(212) 768-2440
Legacy@amrefusa.org

Jay J. Freireich, FREIREICH, L.L.C.
Livingston Office, 354 Eisenhower Parkway Plaza II, Suite 2400, Livingston, New Jersey 07039
Phone: 973-845-2050 | Fax: 973-860-5150
jay@jayfreireich.com