



IRA or Other Retirement Plan Beneficiary Designation

IRA funds or TIAA-CREF or other pension assets beneficiary gifts are 100% deductible from your estate and bypass both income and estate taxes. These taxes can total 75% or more of the assets.

Simply use a “change of beneficiary form” to transfer pension assets to the AAN Foundation rather than a bequest in your will or trust to avoid paying income and estate taxes.

A revocable beneficiary designation allows you to stay in control of these assets during your life and reduce taxes after your life. Plus it is easy to make and change these plans.

Charitable Rollover Trust Funded with Retirement Plan Assets

Using a charitable rollover trust as the beneficiary of your retirement plan assets provides a surviving spouse with income for life. The goal is to increase their income across the years, and reduce their management worries. After their life, the charitable rollover trust leaves a legacy gift to the AAN Foundation.

For you and your advisors information, the proper beneficiary designation language is:

American Academy of Neurology Foundation, St. Paul, Minnesota

For further information, please contact:

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