



ALPHA KAPPA LAMBDA EDUCATION FOUNDATION

ALPHA KAPPA LAMBDA EDUCATION FOUNDATION SUMMARY OF PLANNED GIVING BENEFITS

Your Goal	Avoid Twofold Estate Taxes on IRAs and Other Qualified Retirement Plans	To Give a Gift from Your Estate	Secure a Fixed Income While Managing Market Risks
Type of Gift	Gift of retirement account (IRA) or other qualified retirement plan assets such as 401(K)	Bequest	Charitable Remainder Trust
How to Make a Gift	Complete the “change of beneficiary form” to transfer assets to AKL Education Foundation upon your death.	Name AKL Education Foundation in your Will or trust or add a codicil or addendum to your current Will or trust.	Establish a trust with an investment firm that manages the assets you designate and provides you with annual income and name AKL Education Foundation as beneficiary.
Benefits of Gift	<ul style="list-style-type: none"> • Avoids income and estate taxes on these assets • Easy to make changes 	<ul style="list-style-type: none"> • 100% deductible from your estate • Reduces your potential estate taxes • May enable you to make a larger gift after your death rather than during your life 	<ul style="list-style-type: none"> • Immediate income tax deduction • Bypasses capital gains tax • Removes asset from taxable estate
Excellent For	<ul style="list-style-type: none"> • Those who wish to leave their heirs other assets that carry less of a tax burden than retirement plans. • Those who want the option to change their plans if they desire. 	<ul style="list-style-type: none"> • Those who wish to reduce the tax burden on their heirs. • Those who wish to maintain control of their assets during their lifetime. • Those who want the option to change their plans if they desire. 	<ul style="list-style-type: none"> • Those who wish to have professional management of assets. • Those who want to reduce immediate tax burdens.