

Simple Ways to Shape the Future of Dermatology

Future commitments, plus tax-smart ways to support the Dermatology Foundation today

PART 2 · YOUR GIVING GUIDE

A future gift does not need to be complicated. The first two options below are future commitments that may qualify for Visionary Society membership. The tax-smart options support the Dermatology Foundation today. Your attorney, financial advisor, or account administrator can help determine what is right for you.

WAYS TO MAKE A FUTURE COMMITMENT

Will or Living Trust Beneficiary

Name the Dermatology Foundation for a specific amount or a percentage of your estate while preserving the remainder for other beneficiaries.

Ask your attorney to add the appropriate language.

1. Speak with your attorney.
2. Add the Dermatology Foundation to your will or trust.
3. Let the Dermatology Foundation know about your commitment.

Retirement Account Beneficiary

Name the Dermatology Foundation as a beneficiary of an IRA, 401(k), or another eligible retirement account. No will amendment is required.

Ask the custodian or plan administrator for its beneficiary form.

1. Request the form.
2. Choose a percentage or permitted share.
3. Return the form and tell the Dermatology Foundation.

TAX-SMART WAYS TO SUPPORT THE DERMATOLOGY FOUNDATION TODAY

Donor Advised Fund (DAF)

Recommend a grant to support the Dermatology Foundation today, or ask whether you can name the Dermatology Foundation as a successor beneficiary for a future commitment.

Your DAF sponsor can explain the available options.

1. Contact your DAF sponsor.
2. Choose a current grant or eligible successor designation.
3. Tell the Dermatology Foundation about your decision.

Qualified Charitable Distribution

If you are age 70½ or older, you may be able to give directly from an eligible IRA. A QCD may be excluded from taxable income and may count toward an RMD.

Ask your tax advisor how the rules apply to you.

1. Contact your IRA custodian.
2. Request a direct gift to the Dermatology Foundation.
3. Confirm the details with your tax advisor.

Important: This information is educational and is not legal or tax advice. Please consult your own legal, tax, or financial advisor before making a decision.