

Eversight

Planned giving opportunities

	Advantages	Tax-deduction opportunity*	Income payment	How Eversight will benefit	Other considerations
Bequest	Simple to execute and most common form of planned giving.	Exempt from estate tax or deduction for estate income tax.	N/A	Eversight receives assets according to terms of contributor's will.	Retain control of assets while living. Large gift at no immediate cost. Requires a will.
Life insurance	Substantive gift without a large cash outlay.	May deduct cost of premiums if Eversight owns the policy.	N/A	Eversight receives cash benefit of policy at death. Contributor is responsible for any premiums.	Policy may be given to charity, or charity may simply be named as a beneficiary. Requires a policy.
Retirement plan/IRA plan	Simple to name Eversight as beneficiary. Contributor retains use during lifetime. Avoids estate taxes and potential income tax for heirs.	No tax paid on what would otherwise become one of the highest-taxed assets.	No effect on retirement plan payments to the contributor.	Eversight receives assets at contributor's death.	Congress is making year-to-year decisions about whether IRA distributions can be used for tax-free gifts during the contributor's lifetime (roll over).
Give appreciated stocks	Simple to execute. Contributor receives assistance from their broker.	N/A	N/A	Eversight provides your broker with transfer instructions, sells the stock and recognizes the value as cash.	Allows contributor to make a larger gift without an outlay of cash.
Give via a donor-advised fund (DAF)	Simple way to direct giving to charities of your choice.	Immediate income tax deduction in the year you contribute to your DAF; your investments in a DAF can appreciate tax-free.	N/A	Eversight receives gift according to terms of donor's wishes.	Allows contributor to make a larger gift without an outlay of cash.
Endowment	Leave a permanent legacy, sustaining Eversight mission in perpetuity.	N/A	N/A	Eversight receives sustainable stream of income in perpetuity to sustain our mission.	Gives contributors peace of mind that your charity will continue to receive your vital annual support.

*This planned giving guide is meant only as a reference. Please consult a tax attorney or financial advisor for current tax law interpretations.

Make an impact. Become a Visionary Society member today.



eversightvision.org | @EversightVision | #YouChangeLives
philanthropy@eversightvision.org | (800) 247-7250 ext. 2616



Creating a world without blindness





Three steps for making a planned gift



Determine which planned giving option is best for you. This brochure outlines a number of planned giving options and advantages to consider.



State your intention in your will or trust, or execute your gift in consultation with your trusted financial planning or legal advisor.



Share your plans with us when you have legally documented your planned gift intentions. We wish to recognize your Visionary Society commitment and keep you apprised of news and developments in our work that are of interest to you.

To do so, simply complete and share with us the attached **Statement of Planned Gift Intention Form**. This is not a legally binding document; it simply allows us to be aware of your intention.

In addition to knowing how significantly your gift supports our mission, we want to provide you with Visionary Society opportunities and recognition. These include special invitations, recognition through Eversight publications and installations at our offices that recognize the impact of our extraordinary benefactors.

Planned gifts are essential to helping Eversight carry out our mission—to restore sight and prevent blindness through the healing power of donation, transplantation and research.

Visionary Society

Intention Form

Leave your legacy!

If you are considering including or have already included Eversight in your estate plans or other planned giving, please accept our gratitude. Please tell us more so that we can personally thank you, provide support or answer questions you may have.

- Yes, I have included Eversight in my estate plan.
- Yes, I would like to make a planned gift in my lifetime.
- Not yet, but I plan to make a planned gift.
- I am interested in learning more.

Name _____

Email _____

Phone _____

Address _____

City _____

State _____ Postal code _____

- I do not want to be publicly recognized for my gift.
- Please contact me to discuss further.

Please return to:

Eversight
ATTN: Philanthropy Director
3985 Research Park Drive
Ann Arbor, MI 48108

Planned giving is a meaningful way to express your belief in Eversight's vision—a world without blindness—and your commitment to creating a lasting impact. The Eversight Visionary Society is a community of passionate supporters who have chosen to support Eversight through a planned major gift during their lifetimes or at the time of passing as part of an estate plan or other financial arrangement.

For some, a planned gift provides the opportunity to make a more substantial gift than what is normally possible. For others, it is a chance to complement a lifetime of giving with a permanent legacy to help fulfill our mission for generations to come. Every situation is unique, and we honor each one with deep gratitude for the generosity that our Visionary Society community extends to us through every planned gift.

Cover: A progressive cornea disease left Amber Bright legally blind. Today, she is a bilateral cornea transplant recipient and passionate ambassador for donation.

At top: Neuroscience researcher Patrick Pruitt (center) and his family celebrate 30 years of vision since he received the cornea transplant that changed his life.