



# A Legacy of Lives Saved:

LEGACY GIFTS TO VITALANT FOUNDATION

vitalant<sup>®</sup>  
Foundation

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## TABLE OF CONTENTS

The Power of Legacy Gifts	5
Appreciated Securities	7
Beneficiary Designations	8
IRA Charitable Rollovers	9
Your Will or Living Trust	13
Income-Generating Gifts	15
Real Estate	17
Vitalant's Future, Your Legacy	18

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**For more than 80 years, Vitalant has been saving lives.** As the country's largest independent nonprofit organization focused exclusively on providing blood services, Vitalant supplies our country's hospitals with the essential blood products that make critical cancer care, organ transplants, blood disorder treatment, and trauma care possible for millions of patients every year. And, as the only blood services organization with its own dedicated research center, Vitalant also transforms lives—and the entire blood industry—through our advancements in blood science and transfusion medicine.

We see this legacy in the daily blood drives we host that bring communities together to inspire blood donation, in our leading research that has made transfusions more effective, and in the patients whose lives are saved every day by the blood, plasma, and platelets we provide.

**Vitalant's legacy is one of millions of lives saved—and you have a chance to continue that legacy and make it your own.** When you make a legacy gift to Vitalant Foundation, the official fundraising arm of Vitalant, you not only give back to an essential healthcare services organization, but you also help secure the future of our country's national blood supply and ensure that our lifesaving work continues for generations to come.





# The Power of Legacy Gifts

A Legacy Gift, also known as a planned gift, is a tax-exempt donation to a nonprofit organization that is realized at a later date, typically after the donor's lifetime. Legacy giving is a powerful way to contribute to an organization's long-term future while supporting the causes and values that have given shape and meaning to your life.

The individuals and families that have helped build Vitalant through the power of legacy gifts are far more diverse than any “big donor” stereotype—professionals and community members who have steadily planned for retirement, small-business owners, and of course, patients and their families who have been impacted by lifesaving blood transfusions.

Their generosity contributes to every dimension of Vitalant's work, including:

- Providing 2.1 million units of blood, plasma, and platelets to more than 900 hospitals and healthcare facilities annually.
- Hosting more than 60,000 blood drives each year in partnership with local communities in the 28 states we serve.
- Growing and diversifying the blood donor base to fill current and future needs for a sustainable and robust national blood supply that makes lifesaving care possible for anyone who needs it.
- Training hundreds of blood bank technicians to fill critical gaps in the national healthcare workforce and increasing access to rewarding career opportunities for diverse communities across the country.
- Advancing groundbreaking blood and transfusion science research through Vitalant Research Institute (VRI) and Vitalant Innovation Center (VIC).

Legacy giving is a unique way of giving that empowers anyone to make an extraordinary gift in support of this vital work while also protecting their and their loved ones' financial security. It also offers a variety of financial and tax advantages that allow you to plan for your future with confidence, provide for your family, and achieve your personal and philanthropic goals.





# Legacy Giving Opportunities

Vitalant Foundation offers a wide range of legacy giving opportunities—each with unique donor benefits, but all with transformative impacts. We are honored to share estate planning conversations with you to explore your options and consider how you might create a lifesaving legacy at Vitalant.

## Gifts of Appreciated Securities

Gifts of appreciated securities are an especially exciting planned giving option at Vitalant—all you need are securities or mutual funds that have increased in value and been held for more than one year.

### Benefits

- If you donate during your lifetime, you can avoid both income tax and reduce or eliminate capital gains taxes on the transfer.
- You can also gift appreciated securities after your lifetime by placing a Transfer on Death (TOD) designation on your brokerage or investment account.
- You can achieve impact and tax benefits without updating your living will or trust.

### Your Next Step

- Contact your brokerage or financial advisor to transfer appreciated securities or establish a TOD designation.
- Contact Vitalant Foundation (info on back cover) for additional information and assistance.



## Beneficiary Designations

If you would rather not make a gift through your will or estate, you can make a legacy gift to Vitalant directly through designations on financial assets such as IRAs and retirement plans, life insurance policies, donor advised funds, commercial annuities, bank/brokerage accounts and certificates of deposit. It is easy and allows you to make simple changes with minimal costs due to working through an attorney.

### Benefits

- Does not require committing to a gift in your will or living trust.
- Avoids double taxation on retirement accounts and plans that can be subject to both income and estate taxes.
- Some assets—such as whole life insurance policies—allow you to make Vitalant Foundation a joint or outright owner of the policy, with a potential tax benefit at the time of transfer.

### Your Next Steps

- Contact your account/plan administrator and designate Vitalant Foundation as beneficiary for part or all of the value of the asset or policy.
- Notify Vitalant Foundation of your gift so that we may recognize and celebrate your generosity.
- Contact Vitalant Foundation (info on back cover) for additional information and assistance.



## IRA Charitable Rollovers

In recent years, IRA charitable rollovers have become one of the most popular ways for patients who are 70 1/2 years old or older and their families to make a significant impact while also enjoying unique tax advantages.

Also known as a “qualified charitable distribution,” this option allows you to give up to \$100,000 per year from your IRA directly to a qualified charity such as Vitalant Foundation without having to pay income taxes on the money.

### Benefits

- Your gift makes an immediate impact on Vitalant’s lifesaving work.
- Beginning in the year you turn 73, you can use your gift to satisfy all or part of your required minimum distribution (RMD).
- You pay no income taxes on the gift. The direct transfer generates neither taxable income nor a tax deduction, so you benefit even if you do not itemize your deductions.
- Since the gift does not count as income, it can reduce your annual income level. This may help lower your Medicare premiums and decrease the amount of Social Security that is subject to tax.

### Your Next Steps

- Direct your IRA custodian to make a distribution directly to Vitalant Foundation.
- Contact Vitalant Foundation (info on back cover) for additional information and assistance.



# Living Life to the Fullest

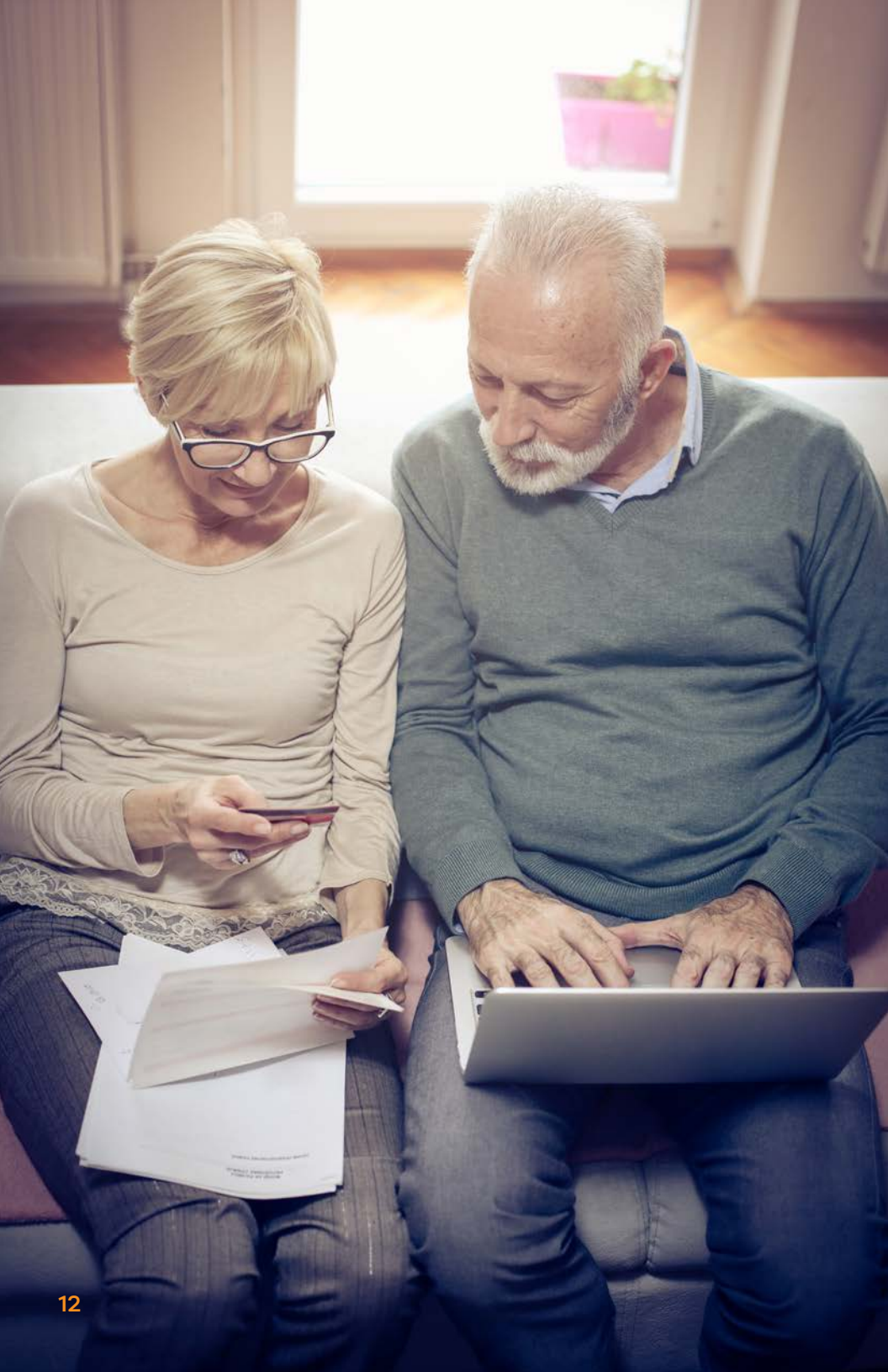
“**My birth story with Peyton** is something I could have never imagined. January 7, 2020 was not only the best day of my life, but also the scariest day of my life. After having the best pregnancy, I thought her birth would be the same.

“My labor was slow going at first, but by 3:45 p.m., baby Peyton joined us with no issues. While I cried with joy and bonded with my baby girl, doctors worked on delivering my placenta. The placenta was very sticky and started to bring my uterus out with it. My uterus became inverted; I was losing a lot of blood. The doctors were unable to stop the bleeding, so I was rushed to the operating room. I received a massive blood transfusion as I lost about 60% of my blood! In order to save my life, they performed an emergency hysterectomy.

“Fast forward a year and it’s February 8, 2021. I am sitting in the Vitalant bloodmobile at Northern Nevada Medical Center donating my blood. I am so incredibly thankful to not only be a blood transfusion recipient, but now a blood donor.

“I choose to share my story to hopefully touch someone who needs it. To show how truly precious our lives are. To push you to hug and kiss your loved ones extra today. To inspire you to live life to the fullest. And to encourage you to donate blood, it can truly save a life.”







## Your Will or Living Trust

One of the simplest and most common ways to make a legacy gift is to leave money or assets to Vitalant in your will. This can include:

- A specific dollar amount
- A percentage of your estate
- A remainder of your estate after other beneficiaries are provided for
- A particular piece of property or asset

In as little as one sentence, you can designate these assets to benefit the millions of patients and their families who depend on Vitalant's lifesaving work.

### Benefits

- Easy to accomplish with simple instructions in your will or living trust.
- Flexible as to amount or percentage of your estate.
- Preserves your flexibility to change your will if life circumstances change.
- Reduces the size of your taxable estate.

### Your Next Steps

- Work with your financial or legal advisor to add giving language to your will or living trust.
- Contact Vitalant Foundation (info on back cover) for additional information or assistance.
- Notify the Vitalant Foundation of your gift so that we may recognize and celebrate your generosity.

# Because of You, Life Doesn't Stop

## **Making a gift to Vitalant felt natural for Gayle.**

Through the years, multiple family members have urgently needed blood. Her husband survived a “widow-maker” heart attack, in part because blood was available when he needed it.

“We cannot chance that the precious lifesaving resource will always be available, especially considering the blood supply shortages in recent years,” Gayle said.

Gayle spent part of her career at the University of Pittsburgh, where physicians were supported by Vitalant, Vitalant Foundation and the National Institutes of Health. To show her appreciation for their work to advance blood safety through research, education and the development of new technology, Gayle expanded her support by becoming a financial donor and past member of the Foundation Board of Trustees.

“I know my financial contributions have made a meaningful impact on the vital work that Vitalant and the Vitalant Foundation carry out,” she said. “A financial contribution is a very powerful way that an individual or organization can aid in Vitalant’s work of maximizing blood resources for people who need it.”



## Income-Generating Gifts

For individuals looking to make a difference while ensuring dependable income for themselves and their families in retirement and beyond, Vitalant Foundation offers a variety of income-generating gifts.

### Benefits

- All income-generating gifts are highly individualized arrangements that can be tailored to suit your unique goals.
- Charitable Gift Annuities yield immediate tax benefits for you and life-changing impacts—and then provide dependable income back to you for the rest of your life.
- Charitable Remainder Trusts provide reliable payments to you and your dependents throughout a specified trust term and then transfer the balance to Vitalant Foundation at the end of the term—ensuring you can balance your commitments to family and your legacy at Vitalant.
- Charitable Lead Trusts make an immediate and lasting difference at Vitalant throughout a specified trust term, and then transfer assets to your family at the end of the term.

### Your Next Steps

- Contact Vitalant Foundation (info on back cover) to explore your options and establish an income-generating gift that best suits your goals.





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## Real Estate

Want to make a legacy gift to Vitalant without touching your bank account? Consider a gift of real estate. There are many ways to make a gift of real estate, each of which offers unique benefits.

### Benefits

- All gifts of real estate: You can avoid capital gains tax on the appreciated value of the property. Many real estate gifts also yield an immediate charitable tax deduction, provided you have owned the property for more than one year.
- Outright gift: You make an immediate gift by deeding the property to the Vitalant Foundation, gain a charitable tax deduction of the fair market value, and avoid the hassle and costs of a market sale.
- Gift in your will or living trust: Retain the property for as long as you need it, make a more significant impact than you may be able to during your lifetime, and reduce the size of your taxable estate.
- Retained life estate: Realize the immediate tax advantages of a gift while retaining the ability to live in (or rent out) your residence for your lifetime.
- Bargain sale: Realize a charitable tax deduction for the difference between the actual value and the sale price paid by Vitalant Foundation—avoiding taxes on an appreciated property and receiving both a lump sum of cash and a charitable deduction at the same time.
- Charitable trusts and annuities: You can also gift real estate into an income-generating trust for you or your family (see Income-Generating Gifts on page 7).

### Your Next Step

- Contact Vitalant (info on back cover) to explore your options for a gift of real estate, in partnership with your financial or legal advisor.

## Vitalant's Future, Your Lifesaving Legacy

From our community blood drives and donation centers, to each of the hospitals and healthcare facilities we serve and to leaps in transfusion science, Vitalant's lifesaving work is made possible by the generosity of our supporters—and there is no more lasting or meaningful support of Vitalant than a planned gift.

By including Vitalant Foundation in your estate today, you will make the deepest commitment to saving the lives of tomorrow.

If it is the right moment for you to think about your legacy, Vitalant Foundation planned giving experts are ready to think through your options with you to determine what best serves your goals and your family.

On behalf of all the communities we serve and patients past, present, and future — we invite you to join us in building an enduring legacy of saving lives.







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