



CLL SOCIETY

Smart Patients Get Smart Care™

**A BRIGHTER
FUTURE FOR CLL:
LEARN HOW
YOUR LEGACY
CAN HAVE A
LASTING IMPACT**

AUGUST 7, 2024

9:30 AM PT, 10:30 AM MT
11:30 AM CT, 12:30 PM ET

SPEAKERS



Ron Katz

(SPEAKER)

Development Director
CLL Society



Brian Koffman

MDCM (retired) MS Ed

(MODERATOR)

Executive Vice President
and Chief Medical Officer
CLL Society



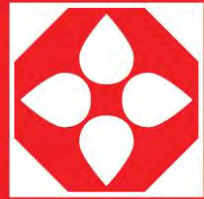
Robyn Brumble

MSN, RN

(WELCOME)

Director of Scientific
Affairs and Research
CLL Society





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WHAT IS LEGACY GIVING?

- **Simply put, it is the transfer of assets to CLL Society as part of your estate plan.**
- **A way to provide for yourself and your family, and still be able to support a cause that is important to you.**
- **Something that anyone can do, and everyone should consider.**
- **Perhaps most importantly, it's easy and might be the most significant impact you can leave behind.**



LET'S FACE IT, WE ARE ALL GOING TO DIE SOMEDAY!

- **With or without CLL, or any other form of cancer, everyone, someday will die.**
- **Estate planning is your way of ensuring that your assets go where you want them to:**



- **Legacy giving is simply the act of including your favorite charity in your estate planning process, and this webinar will show you how easy that can be.**



WHAT ARE YOUR ASSETS, AND WHAT CAN THEY DO?

- **Things we will talk about today include:**
 - Retirement plans (IRAs, 401k plans, other savings).
 - Appreciated assets – stocks you may have owned for many years.
 - Your home, vacation home, or investment property.
 - Any other savings or investment accounts that will need to be passed along after you are gone.



Remember, you can't take it with you, but you can see to it that everything you have worked for ends up making the world a better place.

THINK ABOUT THIS:

- **Baby boomers – those of us between the ages of 60 and 78 – are expected to pass over \$50 trillion in assets to the next generation over the next 25 years.**

Yes, **TRILLION!**

- **Retirement accounts are comprised mainly of highly appreciated stock, which will be taxed when passed to your heirs.**
- **This same generation owns 44% of all real estate wealth, and many homes, including second homes or vacation homes, have no mortgage.**



THE SCARY REALITY

- **Those of us with CLL, or any major health issue, are rightfully concerned about being able to afford our healthcare.**
- **No one wants to be a financial burden to their spouse or children.**
- **But at the same time, we want to help, to give back.**



SO, LET'S GET INTO THE DETAILS

Leave a
Legacy



SIMPLEST AND MOST COMMON TYPES OF PLANNED GIFTS

- **Bequests through a will or trust**
- **Retirement Plan Beneficiary Designation**
- **Life Insurance Assignment**
- **Gifts of Property/Real Estate**
- **Gifts of Appreciated Assets (non-retirement)**
- **Qualified Charitable Distribution (QCD)**
- **Donor Advised Fund (DAF)**



THE BENEFITS YOU MAY HAVE RECEIVED

- **From someone else's legacy:**
 - A college scholarship
 - Museums or arts in your community
 - Healthcare
 - Your local senior center or library



WHAT IS 25 BY 25?

- **CLL Society is looking towards the future and trying hard to meet all of the needs of the CLL/SLL Community. This will require resources.**
- **25 by 25 is our effort to secure commitments for 25 legacy gifts by the end of 2025.**
- **This will help us grow in a predictable way, and provide the funding we need for new and expanded programs.**



“It takes a noble man to plant a seed for a tree that will someday give shade to people he may never meet.”

- D. Elton Trueblood



QUESTIONS?

How to Choose an Estate Planning Attorney:

[www.actec.org/resource-center/video/
how-to-choose-an-estate-planning-attorney](http://www.actec.org/resource-center/video/how-to-choose-an-estate-planning-attorney)



AUDIENCE Q&A



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THANK YOU FOR ATTENDING!

Please take a moment to complete our **post-event survey**,
your feedback is important to us

If your question was not answered, please feel free to email:
asktheexpert@cllsociety.org

Join us for our next webinar,
IMMUNITY AND CLL:
IT'S COMPLICATED BUT UNDERSTANDABLE
on August 29th

CLL SOCIETY is invested in your long life. Please invest in
the long life of the **CLL SOCIETY** by supporting our work:
cllsociety.org/donate-to-cll-society/

