



CLL SOCIETY

A Brighter Future for CLL: Learn How Your Legacy Can Have a Lasting Impact

August 7, 2024

All webinars and interviews are informational only should never be considered financial advice.

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Hello, and welcome to today's webinar.

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I am Robyn Brumble, a registered nurse and CLL Society's director of scientific affairs and Research.

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At CLL society. We are dedicated to a credible and up to date information to the CLL and SLL Community.

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Because we believe smart patients get smart care.

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As a reminder, you can re-watch all of our educational programs by going to this section of our website called Education on demand.

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Prior to beginning our webinar today, we would like to mention a few event items.

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All attendees in this webinar are muted, and the only people on camera are our speakers.

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We ask that you please direct all questions to the QA. Section which is displayed at the bottom of the screen.

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Questions will be sent directly to our moderator. Speakers and CLL Staff.



00:10:59.000 --> 00:11:01.000
And are not visible to the audience.

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After today's event you will receive a very brief survey that will help us plan for future events.

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We greatly appreciate your feedback.

00:11:12.000 --> 00:11:18.000
This session will be recorded and made available to everyone on our website.

00:11:18.000 --> 00:11:20.000
Closed, captions are available.

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If you want to turn them on or off, please go to captions and then select show captions, or hide captions.

00:11:28.000 --> 00:11:30.000
At this time.

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I would like to introduce our moderator. Thank you.

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Thank you, Robyn.

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I would like to take this time to welcome our audience to today's event.

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We are joined by Ron Katz, Director of Development at CLL Society.

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Ron has dedicated his career.

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To helping important nonprofits funds to carry out their missions.

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Whether in healthcare.



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Social services or education.

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After Ron was diagnosed with Cll in 22.

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He recognized the opportunity to put his experience to work.

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For the Cls. Society.

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Ron will be answering audience questions at the end of this event.

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So please take advantage of this opportunity.

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And ask your questions in the Q. And a box.

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It's now my pleasure to welcome.

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Ron, Cats.

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Welcome to Cls. Society's 1st webinar on legacy, giving.

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And thank you for your interest in this important topic.

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My name is Ron Katz. I'm the Development Director for Cll Society.

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Let me tell you a little bit about myself before we begin.

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I spent most of my adult life.



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Working to raise funds for some very important nonprofit organizations like society.

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But for me this became real.

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When I was diagnosed in 2,000 with CLL.

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I was extremely fortunate that shortly after that I was able to bring my skills and experience to work.

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For Cl. Society.

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To help create a better life for all of us.

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Let's take a look at why, we're having this conversation about legacy giving today.

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Cl. Society, as I said, is a nonprofit organization, with a singular mission of improving care and quality of life for all of us living with CLL.

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Charitable giving helps us provide programs, support research and advocacy.

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And much more.

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Information that we've all come to.

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See, our society depends on support from those who understand the challenges of living with CLL.

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We know that even though treatments are improving.

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CLL will be around for a long time.

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And we want to ensure that this organization and the work it does.

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Is also around for a long time.

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August.

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National and Maker will month.

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An annual reminder about the benefits of creating or updating your will and your estate plan.

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Only about 34% of American adults have a will.

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And the number. One reason most people give for not having a will is that they just keep putting it off.

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So national. Make-well munch.

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Is a great time to check this critically important item of your to do list.

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But it's a great time to think about your priorities, and what kind of legacy.

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You wish to leave through charitable giving.

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And we hope that Cl. Society will be part of your plans.

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One quick note before we get into the details of legacy, giving.



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Yeah, this information provided today is very broad.

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When it comes to estate planning, everybody is different, needs different interests, different priorities.

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I can respond to a lot of questions later in our QA. And also private conversations with anyone looking for more information. But it's important to remember to communicate with your your own professional advisors for legal questions or tax questions.

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So.

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What is legacy given.

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That may be a new new term, or you may have heard it many times before. Giving is essentially the same as planned giving or charitable charitable estate.

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Planning.

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They all refer to the same process.

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Simply put, it's the charitable transfer of assets in this case.

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To cl society.

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As part of your estate. Plan.

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And let's not get scared by the term estate.

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You don't need to be wealthy to leave a legacy gift.



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Anyone can do this. And today.

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You'll see how easy that can.

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Legacy given is a way for.

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For you to provide for yourself and your family.

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And still be able to support a cause that's important to you.

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To chance to take control of an uncertain future.

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By making financial and real estate plans. Now, instead of leaving it up to others.

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To decide after you're gone.

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Through a will and estate planning, you can ensure that your finances and belongings are used the way you want them to be used.

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It's an opportunity to lock in support for your loved ones.

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And if Charles, charitable support is important to you.

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A will or other plan, giving tool.

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Is a powerful way to submit your legacy of philanthropy.

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Charitable gift. Planning is something that anyone can do, and everyone should consider. It's not just for the wealthy.



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But perhaps most importantly.

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Charitable gift planning might be.

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The most significant impact you can leave behind.

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Why is this?

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We understand that those of us living with CLL may require costly medical benefits. Medical care.

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Now we're in the future.

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With that knowledge. Sometimes it's hard for people to think about giving today.

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But legacy giving allows us to make decisions. Now.

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For charitable giving in the future.

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If you feel that CLL Society has been a valuable resource to you and your family.

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As you've navigated living with this disease.

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But maybe you fear the unknown.

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Maybe here the unknown has prevented you.

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From being able to support these programs.



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You might want to think about.

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Charitable gift, planning.

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Let's face it.

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We're all gonna die someday.

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Sometimes. That's an awkward conversation to have.

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But the inevitability of death is exactly why it's so important for us to talk about it, and even plan for what happens afterwards.

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Estate. Planning is your way of ensuring that your assets go.

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Where you want them to.

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Your family, your community.

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And your priorities.

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Legacy giving is simply the act of including your favorite char.

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In your state planning process.

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So what are your assets that we talk about when we, when we think about estate planning? What are the kinds of things that would be.

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Included in a plan like that. Well, you know, we we have retirement plans that might include Iras.

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Other appreciated assets in investment accounts.

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Vacation, home.

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A second home, or even your own.

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Other savings.

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All of these can become part of your estate plan, and can become part of.

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A charitable giving plan, as well.

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Think about this.

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50 trillion dollars. Yes, trillion.

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Will be passed on.

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From one generation to the next over the next 25 years from the baby boomer generation. Primarily those of us between ages 60 and 78.

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Are going to pass on.

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An enormous amount of wealth.

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To the next generation. Basically, that's twice.



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2 times the size of the Us. Economy measured by our gross domestic product. That's an enormous amount.

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That.

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Think about the amount of good that that can do if we all.

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Include charitable gift planning in our State planning. And if even a small percentage of that 50 trillion dollars.

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Goes to support charities like.

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The Cls. Society.

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But we know that.

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Reality can be scary.

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Financial, planning.

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To last us. The rest of our lives can always be unpredictable, and with the.

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Expenses related to living with CII, both medical expenses and other expenses.

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We need. We. We know that we need to be cautious about how we plan for the rest of our lives. So there's.

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Maybe reason for some of us to be.

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Scared, or at least wanna manage our expenses carefully.

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And that's why legacy given can be so useful.

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Nothing comes out of your estate.

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Until after. You no longer need those assets, and even then.

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You can control how much goes to, how much goes to your family and other priorities.

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So.

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Let's look at the details.

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How do we leave a legacy.

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But there are a number of ways, and and these are most of these are really pretty simple, and a lot of these terms you've you've all probably heard before.

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There are some very complicated ways of making legacy gifts and a lot of large organizations like.

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Universities and hospitals will very often talk about different kinds of charitable trust and.

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Things that can be can be somewhat complex and need a number of.

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Professionals involved. Society. We like to keep things a little bit more simple, and there are a number of very.

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Straightforward ways that anybody can leave a.



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A charitable gift in their State plan to cla society. So let's take a look at a couple of those.

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Request. Certainly. By far the most common. The quest is simply including language in your will.

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Or trust, if you have one connected to your will that just says that you would like either.

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Percentage of your estate or fixed dollar amount.

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To go to a charitable organization.

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After your passing.

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These are revocable. So these are decisions that can be changed at any time.

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If you already have a will, you don't need to go back and create a new one. If you wish to include society.

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You just include what's called a codicil and a coda is basically an amendment to your will.

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That would include.

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Cls society or any other organization, and and you can include.

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A single organization, multiple organizations.

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You can decide.



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How much of your assets goes to.

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Family or your community.

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Perhaps the local hospital where you were treated for your CI. And of course you know, we hope that the CI. Society would be part of that, as well.

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Retirement plans.

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Also very easy. A lot of people have.

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Iras, 401 K's.

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Plans like that! That will.

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Generally have an opportunity for you to assign either a single beneficiary or even multiple beneficiaries.

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So, for example, if you wanted.

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Your your children, or other family members, to receive.

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Half of your retirement, plan and CI. Society to receive the other half.

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You can do that just through assigning us as a.

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As a beneficiary rather than.

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Having to do that through a will, or trust plans.

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Charitable, given, very easy, actually.

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Life insurance can be a little bit more complicated. There are different kinds of life insurance policies and different ways that they can be assigned as a.

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Charitable Gift.

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So many variables that I won't go into the detail here. But if anybody has a life insurance policy that.

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They would like to consider donating to Cls society. You can always reach out to me, and and we can discuss the details and talk through exactly how that would work. But it's something that's becoming.

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Increasingly common these days for people.

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Find that they have life insurance policies, that they or their spouses.

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Might not need the benefit of after they pass.

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Gives a real estate actually just got.

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A lot easier for Cl. Society. We've partnered with.

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National organization, the same one that we've partnered with in the past to to.

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Accept donations of cars and other vehicles.

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They do a great job at facilitating real estate donations and.

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They manage all of the expenses. So if somebody had a.

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A second home, or a vacation home or other property that they wanted to donate.

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It would go.

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This other organization would manage all of that. So you would have no cost. You wouldn't have to pay taxes.

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Commissions or any other expenses. You just.

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Donate that property outright.

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And once it's sold, the proceeds of that come to Cls society.

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All of the information for that is on our website. Very.

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Very easy process to go through.

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Get some appreciated assets.

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These days with it, with the stock market where it is, you know, if anybody is invested in.

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Bitcoin when it was worth just a few dollars per coin. And now it's you know, appreciated tremendously.

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Any of these.



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Assets can be donated.

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Through a charitable gift through a brokerage account, or directly to us.

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Either now or as part of an estate plan. So there's a lot of flexibility with appreciated assets depending on.

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When you need the tax benefit, because if you.

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Have investments in stock.

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And that stock, you know, now, is worth.

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10 or 15 times what you paid for a long time ago.

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You can.

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Yeah, if you were to sell that right now, you would pay a significant amount of tax.

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You can donate that and Cl. Society as a nonprofit.

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Tax Free organization.

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Would not need to pay any taxes on that, so it would. It would benefit.

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Us at a much higher level than if you were to sell the stock 1st and make a donation from the proceeds.

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Qualified charitable distributions. This is, if anybody has a an Ira, and if you're over.



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Depending on when you were born. If you're over 72, or 73 years old.

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You're required to take minimum distributions every year from that.

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From that Ira.

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You can make the qualified charitable distribution directly to a nonprofit. A lot of people don't know this. You don't. If you take that.

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Required minimum distribution, directly.

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To you.

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You pay tax on that.

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If you take that.

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Distribution and transfer it directly to a nonprofit like society.

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There's no text, and and you can do that for.

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Up to a hundred 5,000, actually \$105,000.

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Per year, or \$210,000 for a married couple. So.

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The benefit of that can be very significant.

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If you have an Ira, and and you plan on leaving it to your heirs.



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Keep in mind that any pretax I race so, in other words, anything other than a roth. Ira.

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Your errors will be required to.

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To fully

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Pay the taxes on that. Within 10 years.

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So.

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You know, if you if you're looking to.

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Pass on.

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Any accounts to your heirs.

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And you may think that oh, you're an Ira or Retirement account like that.

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Would be tax free. Remember that the taxes will need to be paid.

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At some point within 10 years. So if you're looking to make a.

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A charitable Deduction.

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Disqualified, charitable distribution from an Ira could be a very effective way to do that.

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And donor advise finds a lot of people. These are becoming much more popular these days.



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A lot of people are starting to use. Owner advised funds, either through a local.

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Community foundation or another financial institution that.

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Manages, trusts.

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They're they're relatively easy to set up the nice thing about donor advised funds.

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Is, that.

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They are.

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Fully tax deductible. In other words, you get the full tax benefit in the year that you make.

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The payment into the donor advised fund.

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The the flip side to that. Unlike.

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Requests is that donor vice funds are not revocable. Once you've made that donation.

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And taken the tax benefit for that.

00:27:19.000 --> 00:27:20.000

A.

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You. You can't change that decision that's made. What you can do, though, is change on an annual basis, or or for into the future.

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How that money is distributed. In other words, what organizations you would like that fund.

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To support.

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So during your lifetime. If you have a donor advised fund.

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Annually. You can choose to direct.

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Proceeds from that towards Cl. Society.

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As part of your estate plan. You can make that decision in perpetuity. You can.

00:27:52.000 --> 00:27:53.000

You can.

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Direct, that.

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Funds from that donor Advise fund will go to support Cls society in the future as well. So it does give you like that. But keep in mind that once you've established a donor revised fund.

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That's not a revocable decision. That's that's done.

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So those are the.

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Really the main ways that ClI society is looking.

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Discuss.

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Brand gift legacy gifts with our donors, and I think there's a lot of flexibility in these depending on what.

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Any individual might be interested in doing what? What kind of benefits you're looking.

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For if tax benefits.

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Are important to you right now, or if you'd rather have.

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The tax benefits be available to your errors in the future.

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There are different ways that we can.

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Work with these plan, giving opportunities.

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To make sure that you get the benefits that you're looking for as well.

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A couple of ways that you or family members may have.

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Actually received benefits from.

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Somebody else's legacy gifts they, you know, these are.

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These have been around for a long time, and and are very common in the past. They were much more common at larger organizations. As I mentioned, universities and hospitals.

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Now.

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It's much more common to see organizations like Cl. Society.



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Also.

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Using.

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Legacy gives to increased financial stability. So this is a way that.

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As an organization. Cl. Society.

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Can look at into the future and say, What will our.

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Assets look like, what will our support system look like so that we can make decisions about how we can best.

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Support, the the cl, community.

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And these are.

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Some ways that legacy gifts have been used commonly scholarships.

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Museums and arts. Organizations will very often use legacy gifts.

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To plan forward and look at what types of benefits they can provide to their community.

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Healthcare hospitals.

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Very often we'll use legacy gifts for any number of things for programs, but also for.

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Helping to reduce cost, provide.



CLL SOCIETY

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Free bed service to people who can't afford to pay for those services themselves.

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Local senior centers. Organizations like that.

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So, yeah, PAA lot of people will look to.

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The organizations that have been important in their own lives or to their families when they're thinking about.

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Legacy, giving and.

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Very often people think about their own local community.

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The organizations that.

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Have provided there.

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Healthcare.

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And and certainly organizations like CII that we feel. You know we we strive.

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To give everybody the best information, so that you can have.

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The the greatest longevity and greatest quality of life.

00:30:53.000 --> 00:30:54.000

While you're living with CI. Allen.

00:30:54.000 --> 00:31:04.000



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We hope that that's something that people remember and think about when they're making decisions about how they would like their assets to be used in the future.

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So this is something that.

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That is a.

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Relatively new.

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Opportunity for seal. Society! We haven't done a lot of legacy giving in the past. This is the 1st time we've really had.

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A conversation with you with with our donors about this type of giving.

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And along with this we've set up a little bit of a goal, a little bit of a challenge, I guess I'd I'd call it, where what we're looking at is 25 by 25. What we'd like to do is have.

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25.

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Individuals or families.

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Make a legacy commitment by the end of 2,025.

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So we've got some time. That's not, you know. That's.

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Almost 18 months, away.

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These decisions can take some time, and we understand that they're not.

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To benefit this community through.



CLL SOCIETY

00:32:16.000 --> 00:32:17.000

Through legacy gifts.

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Legacy giving is about the future.

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It's about who we want to help.

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How we want to be remembered.

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And what kind of change we can.

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Each, make.

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To ensure a better future.

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And Elton Trublad, who's a.

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Writer.

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Made this comment that I thought was very appropriate. It takes a noble man to plan to see it for a tree that will someday give shade.

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To people he may never meet, because that's really.

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What we're doing when we leave a legacy gift.

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Is, we are, we are.

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Providing the resources.



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00:32:51.000 --> 00:32:54.000

For people in the future. People we may never know.

00:32:54.000 --> 00:32:57.000

But people who we know will be living with CLL in the future.

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Providing the resources to make sure that they have the same.

00:33:02.000 --> 00:33:06.000

Information and opportunities to learn about their disease, and to receive.

00:33:06.000 --> 00:33:07.000

Better treatment.

00:33:07.000 --> 00:33:09.000

So.

00:33:09.000 --> 00:33:11.000

I hope that.

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Many of you will.

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Join us in this challenge and have a conversation with us about leaving a legacy gift, and that's the 1st step is.

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To give you the opportunity to ask some questions.

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And I look forward to.

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And being able to answer your questions in in the coming minutes, as we have time left in this webinar to

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To have this discussion. What other resource I've just put up here on on the screen.

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How did she was in the state planning.

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And we can send this link out to anybody who's interested. But.

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The American College, for of trust in a State Council is a very.

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Solid resource.

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For anybody interested in trying to in finding an Estate Council estate planning council in their community. It's a very trusted organization, and they have.

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They can make recommendations really anywhere across the country.

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People that can be relied on is

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As council. So if you don't have interstate planning at this point, I would encourage you to reach out to them. But having said that I look forward to answering any questions that anybody might have.