

PLANNED GIVING



REMEMBER CVB IN YOUR WILL, REVOCABLE TRUST, OR BENEFICIARY DESIGNATION.

Creating a will and revocable trust is a smart way to provide for your loved ones and the causes you care about. A gift in your will or trust, often referred to as a charitable legacy, allows you to make a significant impact advancing brain health by fast-tracking precision diagnostics and tailored therapeutics to help lead the way to cure “invisible wounds” for the millions of veterans, service members, first responders, and civilians who suffer from trauma-related conditions. Legacies to charitable organizations are not subject to estate tax. You can also designate Cohen Veterans Bioscience as a beneficiary of your accounts, including brokerage and retirement accounts, to receive distributions upon your death. This is a quick and easy way to remember a charity in your estate plan, and a gift from a retirement account can have significant income tax (as well as estate tax) benefits at death.

HOW IT WORKS

1. You can provide now for a future gift to Cohen Veterans Bioscience by including a legacy provision in your will or revocable trust or by designating Cohen Veterans Bioscience as a full or partial beneficiary of your retirement plan.
2. Your will, trust, or retirement plan directs assets to your heirs.
3. Your will, trust, or retirement plan directs a legacy or distribution to Cohen Veterans Bioscience.

BENEFITS

- You can name your gift after yourself or a loved one.
- Your assets remain in your control during your lifetime.
- You can modify your legacy if your circumstances change.
- There is no upper-limit on the estate tax deductions that can be taken for charitable legacies.
- You can designate all or a percentage of a bank, brokerage, or retirement account and can change your beneficiaries at any time. There is no charge to update your beneficiary form. Donating assets from a retirement account can also minimize the income tax obligations of your estate (in addition to the charitable estate tax deduction), resulting in more assets passing to your heirs and charitable gift recipients.

SAMPLE LEGACY LANGUAGE

The following are examples of how to indicate a general or undesignated gift to Cohen Veterans Bioscience*

SAMPLE GIFT OF REMAINDER/RESIDUAL ESTATE

“I give, devise, and bequeath to Cohen Veterans Bioscience TAX I.D. #47-1981973, or any successor organization thereto, to be used for general support, all [or state the fraction or percentage] of the rest, residue, and remainder of my estate, both real and personal.”

SAMPLE GIFT OF SPECIFIC AMOUNT

“I give, devise, and bequeath the sum of \$ amount to Cohen Veterans Bioscience, Inc. TAX I.D. #47-1981973, located in New York, New York, or any successor organization thereto, to be used for general support.”

“If [Name] is not then living, I give, devise, and bequeath the sum of \$ Amount to Cohen Veterans Bioscience, Inc. TAX I.D. #47-1981973, located in New York, New York, or any successor organization thereto, to be used for general support.”

*These are merely suggestions as to content and should be written or adapted by legal counsel to fit the contributor’s individual situation.

ACCOUNT OR RETIREMENT PLAN BENEFICIARY DESIGNATION

Contact your retirement plan administrator for information regarding how to designate Cohen Veterans Bioscience as a full or partial beneficiary of your retirement plan. Advice of counsel may be required.

DECLARATION OF SUPPORT



Advisor Notification of Client(s) Inclusion of Cohen Veterans Bioscience in Estate Plan
Please tell us about any recent planned giving to Cohen Veterans Bioscience.

I am pleased to report that my client(s) _____ (names optional)
has included the Cohen Veterans Bioscience in his/her/their estate plan in the following manner:

1. Type of Gift

As a beneficiary in a will or living trust.

Check one: Specific Residual Contingent

As a beneficiary in a Charitable Remainder Trust or Charitable Lead Trust.

% Payout Rate: _____

As a beneficiary pursuant to a retirement plan beneficiary designation:

Check one: Primary Secondary/Contingent

Check one: Full Partial

2. Estimated value to Cohen Veterans Bioscience

3. Date of client's birth

4. Gender of Client: Male Female

5. Gift is to be used by Cohen Veterans Bioscience:

Check one In such manner as its mission may determine.

Subject to the following restrictions: _____

My client(s) would like their name(s) to appear as

In memory of or In honor of

Please do not list my client(s) name(s). The commitment should appear "Anonymous"

I trust this information will be held in the strictest confidence and utilized only for estimating the value of future gifts. It is understood that this Declaration of Support is not legally binding and that the future gift to Cohen Veterans Bioscience may be changed without notice. I certify that the above-referenced client(s) is/are aware of, and have given me permission to submit, this Declaration of Support to you.

Date

Address

Advisor Name and Signature

City

State

Zip

Phone number
