



YOUR SUPPORT MAKES A DIFFERENCE:

Ways You Can Give to the BCRFA

Invest in local, lifesaving research today. [DONATE ONLINE](#)

To download our printable donation form, [click here](#).

Be sure to check to see if your employer will match your donation by [clicking here](#).

There are several other ways you can support the BCRFA and our mission:

- Gifts of **cash** or **stocks**
- **Beneficiary designations** from your will, trust, or retirement accounts
- Donations of **property** (real estate or vehicles)
- Any combination of the above to maximize your tax benefits and impact

Legacy & Planned Giving Options

Legacy gifts offer creative, flexible strategies for your estate and charitable planning. These techniques make use of legal and tax strategies to best suit your unique situation and help you accomplish the personal and philanthropic goals that mean the most to you.

Types of legacy gifts include bequests, trust provisions, retirement fund beneficiary designations, charitable gift annuities, and gifts of an asset such as personal property or real estate.

IRA Charitable Rollover (also known as Qualified Charitable Distribution)

The IRA Charitable Rollover (also known as a Qualified Charitable Distribution) is an excellent way to support the BCRFA and receive tax benefits in return. Donors aged 70.5 and older can take advantage of this technique and transfer up to \$100,000 directly from a qualified retirement plan to BCRFA. Qualified Charitable Distribution (QCD) can help people 73 and over comply with Required Minimum Distribution (RMD) rules. You won't pay any income tax on the charitable transfer and, if you have to take Required Minimum Distribution (RMD), the transfer counts toward your Required Minimum Distribution.

- **Legal name:** The Breast Cancer Research Foundation of Alabama
- **Legal address:** 4 Office Park Circle, Suite 109, Birmingham, AL 35223
- **Federal tax ID number:** 63-1162650

Stocks & Bonds

If you have stock in a taxable account that has appreciated in value, you can donate it directly to the BCRFA through our account at Merrill Lynch.

Donating gifts of appreciated securities that have been held for more than one year enables you to:

- Avoid capital gains tax on the appreciated portion of the stock
- Qualify for the tax deduction equal to the stock's full fair market value
- Make a larger gift than might be possible otherwise

Please let us know when you plan to make a gift. We will not know to expect your gift unless you notify us. We want to note your giving record and properly thank you for your generosity.

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Contact:

Beth Davis, President & CEO

205.413.4600

beth@bcrfa.org

Or have your broker contact:

Bonnye Paul or Bryan Morgan at Merrill-Lynch

Phone: 205.326.9699

BCRFA DTC #: 8862

BCRFA Merrill-Lynch Acct #: 52402931

Donor Advised Funds

The BCRFA, as a registered 501(c)(3) non-profit organization, accepts gifts through Donor Advised Funds (DAFs). To make a gift through your DAF, first contact your financial/legal advisor or your DAF representative to recommend a grant to the BCRFA. We hope you will choose to include your contact information with your gift so that we can thank you for your generosity. Your DAF administrator may require the following information:

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Limitations to donating through a donor-advised fund:

- Donors cannot use their DAF to pay off an already existing debt or obligation.
- Money in DAFs have already received tax deductions, therefore a gift from a DAF cannot be used to pay for goods and services, such as event tickets or thank you gifts.

To learn more about any of these and other legacy giving options, please contact:

Beth Davis

President & CEO

205.413.4600

beth@bcrfa.org