American Heart Association®
Professional Advisor Network

Resources to Help Your Clients with Tax and Charitable Planning

We Can Help You Help Your Clients

The **American Heart Association (AHA) Professional Advisor Network** supports advisors with free estate and charitable gift planning solutions, helping you offer your clients meaningful options to reach their unique personal and financial goals, and to grow your practice while helping save more lives from heart diseases and stroke.

Professional Advisor Network Benefits

- Opportunities for advisor and client networking
- Assistance in connecting with your clients on a deeper level with mission materials
- Access to continuing education to keep your knowledge and your credentials current
- Turnkey solutions for gifts of non-cash assets
- The latest tax and legislative news on charitable giving
- Personal assistance from our nationwide team of professionals, including custom illustrated gift planning solutions, resources and tools

"It's important to know the advisors and other professionals that work for charities like the American Heart Association, as proper introductions can be made when clients want to designate gifts to this charity or others. It gives clients peace of mind that their charitable gifts will be used as they intend."

– Professional Advisor Network Member

Turnkey Solutions for Giving

The AHA has created streamlined approaches for you and your clients to make charitable gifts of non-cash assets.

American Heart Association Real Estate Program

We accept gifts of primary and vacation homes, commercial property and farmland, whether in exchange for a tax deduction, a charitable gift annuity or a retained life estate.

Charitable Gift Annuities

Charitable Gift Annuities with the AHA ($5,000 minimum contribution) can be funded with cash or non-cash assets to provide a fixed lifetime income and tax benefits.

Charitable Remainder and Lead Trusts

As trustee, the AHA can eliminate most of the time-consuming administrative work (e.g. tax returns, asset balancing, making distributions) associated with an otherwise self-trusteed trust.

The AHA Donor Advised Fund Program

The AHA Donor Advised Fund Program is an excellent option for donors who are looking for an immediate tax deduction but would like the flexibility to decide where to designate their giving.

The AHA Donor Advised Fund Program ($25,000 minimum contribution) may be funded through cash, non-cash assets or a combination of both.

Beneficiary Designations

We can provide guidance on the selection of a beneficiary designation through a POD (Payable on Death) or TOD (Transfer on Death) depending on the asset.

Bequests by Will or Living Trust

We provide sample wording for client-specific gifts.

Why the American Heart Association?

For nearly a century, the AHA has made an extraordinary difference in the lives and health of millions of people.

With heart disease being the No. 1 killer of men and women worldwide, and stroke ranking second, your work and your client's contributions enable us to fulfill our mission to see a world free of cardiovascular diseases and stroke.

Since 1949, the AHA has invested more than $4.8 billion toward scientific research, more than any other organization outside of the federal government. AHA-funded discoveries include the first implantable pacemakers, the first artificial heart valve, CPR techniques and cholesterol-lowering medications. We've also funded research by 14 Nobel Prize winners.

We are proud of this important work, and we hope you will join us. Together, we can do more for a world of longer, healthier lives.

Finn was born with multiple heart defects and spent the first eight months of his life in the hospital. By the time he turned six, he had 14 surgeries to help his heart. Today, Finn is a fun-loving, energetic first-grader.

Join the American Heart Association Professional Advisor Network

The Network is a free and simple way to provide your clients with meaningful legacy opportunities. Simply go online to sign up at heart.org/Network or complete the following information, and send your form to advisor@heart.org to join. You will be kept up-to-date on charitable giving tips, tools and resources for you and your clients.

Title:__________ Name: First*:____________________Middle Initial:_______ Last*: ______________________________________

Company*: ____ Job Title*: ____

Address: ____ City: ____________________ State: _____ Zip: __________

Phone: (______) ________-__________

How would you like to receive the materials? ❑ Electronically (email required) ❑ U.S. Mail ❑ Both (email required)

Email: ____

What materials are you interested in?

- ❑ Ways to Give One-Pager
- ❑ Charitable Gift Planning Guidelines
- ❑ Federal Tax Pocket Guide
- ❑ Stock Gifts One-Pager
- ❑ Financial Guidelines
- ❑ AHA Impact Guide

Requests for more information are confidential and never represent an obligation.

Join the AHA Professional Advisor Network now

American Heart Association®
Professional Advisor Network

Heart.org/Network
888-227-5242 | Advisor@heart.org

Tax Identification Number: 13-5613797
Legal Name: American Heart Association, Inc.
Official Address: 7272 Greenville Ave., Dallas, TX 75231

ACCREDITED BUSINESS