

WESTERN STATES  
**CANCER**  
RESEARCH

NCORP



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Planned Giving Options  
and Legacy Society



Planned giving provides you the opportunity to make a donation to help cancer patients and their physicians gain access to innovative treatment options, including clinical trials, in their own communities. As part of your overall financial planning for your assets and the tax

benefits of charitable giving, as well as your estate planning, legacy gifts help you arrange a major charitable contribution in the present so you can see the powerful impact of your philanthropy. The following are planned giving options for you to consider as you plan your charitable legacy.

## Planned Giving Options

### **Bequest**

A bequest can be made by naming Western States Cancer Research NCORP (WSCR-NCORP) as a charitable beneficiary in a new will or adding a codicil to an existing will. The bequest can be in the form of a stated dollar amount or specific property, a percentage of the estate or a portion of the entire residue.

### **Gifts of Retirement Plan Assets/Individual Retirement Accounts (IRAs)**

Retirement plan accounts and IRAs may be subjected to both estate and income tax. To avoid any potential taxes on funds given to WSCR-NCORP, donors can name WSCR-NCORP as one of the beneficiaries of their retirement plan or IRA.

### **Life Insurance**

A gift of life insurance may be made by naming WSCR-NCORP as the policy owner and beneficiary. A gift of life insurance can offer valuable income and estate tax savings. There can also be an immediate tax savings when our nonprofit 501(c)(3) organization is named owner and beneficiary of a non-term life insurance policy.

### **Charitable Remainder Trust**

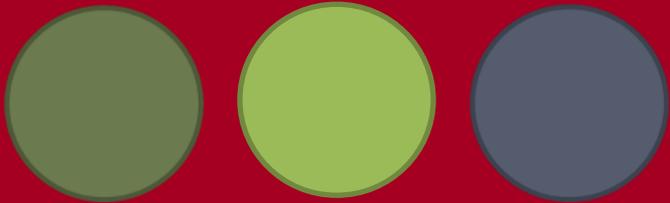
A charitable remainder trust establishes a trust for the ultimate benefit of WSCR-NCORP. The donor retains a lifetime income stream generated by the trust. A charitable remainder trust may help donors to receive a current income tax deduction, eliminate capital gains taxes, reduce or eliminate gift and estate taxes and improve lifetime cash flow.

## **Charitable Lead Trust**

A charitable lead trust allows a donor to establish a trust that provides a stream of charitable dollars for a specified number of years. The remainder is then returned to the donor or his or her named beneficiary. Benefits may include the transfer of assets to others free of estate, gift and income taxes.

## **Gifts of Real Estate**

A “retained life estate agreement” is one way to contribute real estate. This giving option allows you to remain living in or using your home, rental properties, vacation home or farm while establishing a gift of that property to WSCR-NCORP. The donor receives an income or capital gains tax deduction in the year the gift is made and receives the property at the end of the retained life estate term, usually the donor 's lifetime.



## About Western States Cancer Research

Western States Cancer Research NCORP, an affiliate of the National Cancer Institute (NCI), provides cancer patients with cutting-edge treatment options through innovative research and clinical trials in their own communities with their own doctors. WSCR-NCORP began in 1983 as Colorado's first and only regional community research organization. Our work has delivered numerous discoveries and breakthroughs. Each year, WSCR-NCORP has approximately 300 cancer patients participating in an average of 79 clinical trials. Over the same time period, we have more than 70 physicians conducting cancer research, and nearly 1,500 patients being followed for their post-treatment health status.

Our Federal Tax ID number is 84-1090476.

## Our Mission

Western States Cancer Research NCORP provides the people of Colorado, southern Wyoming, Montana, Utah, Washington state, and Alaska the opportunity to participate in and benefit from medical research conducted through cancer clinical studies.

## Learn More

Please contact our Major Gifts and Planned Giving Officer | 720-475-5728  
[lgabbay@westernstatesncorp.org](mailto:lgabbay@westernstatesncorp.org)

We recommend consulting with your own legal and tax accounting advisors before making any type of planned gift.

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