



By making a planned gift, you have the opportunity to become a **partner in progress**.  
Your planned gift will contribute to groundbreaking discoveries and innovations for  
years to come, bringing us one step closer to eradicating cancer.

### Bequests

Ensure your support lives on by including PHASE ONE in your will or trust. Leave a legacy that will fuel groundbreaking research for generations to come.

### Beneficiary Designations

By naming PHASE ONE as a beneficiary in your retirement account, life insurance policy, or other financial assets you can pave the way for future clinical trials.

### Other Giving Options

There are a variety of other ways to make a lasting impact through a planned gift that you can explore with your legal and/or financial advisor(s) including charitable gift annuities, charitable remainder trusts, and pooled income fund donations.

### Thank You!

PHASE ONE is grateful for your consideration of such a profound gift. To learn more about your specific options, please consult your legal and/or financial advisor(s). To help you get started, sample language can be found on the back of this document.

**If you have already made a planned gift to PHASE ONE please let us know!  
We would love to thank you and learn more about the research that matters to you.**

The information contained herein is not intended as legal advice and does not necessarily reflect the opinion of PHASE ONE or any of its attorneys, employees or clients. Additional facts or future developments may affect subjects contained herein and no guarantee is given that the information provided is correct, complete or up-to-date. Seek the advice of an attorney before acting or relying upon any information provided herein.

PHASE ONE FOUNDATION IS A 501(C)(3) NONPROFIT • TAX ID NUMBER: 91-2129319 • (310) 458-7715 • INFO@PHASEONEFOUNDATION.ORG

## Sample Language

### Residual Bequest Language

*A residual bequest comes to us after your estate expenses and specific bequests are paid:*

I give, devise and bequeath to the PHASE ONE Foundation located at 11726 San Vicente Blvd, Ste 560, Los Angeles, CA 90049, Tax ID #91-2129319, all (or state a percentage) of the rest, residue and remainder of my estate, both real and personal, for its unrestricted charitable use and purpose.

### Specific Bequest Language

*Naming PHASE ONE Foundation as a beneficiary of a specific amount from your estate is easy:*

I give and devise to the PHASE ONE Foundation located at 11726 San Vicente Blvd, Ste 560, Los Angeles, CA 90049, Tax ID #91-2129319, the sum of \$ \_\_\_\_\_ for its unrestricted charitable use and purpose.

### Contingent Bequest Language

*The PHASE ONE Foundation or its affiliates can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled:*

If (insert name) is not living at the time of my demise, I give and devise to the PHASE ONE Foundation located at 11726 San Vicente Blvd, Ste 560, Los Angeles, CA 90049, Tax ID #91-2129319, the sum of \$ \_\_\_\_\_ (or all or a percentage of the residue of my estate) for its unrestricted charitable use and purpose.

### Retirement Plan Beneficiary Language

*You may name the PHASE ONE Foundation as a beneficiary of your IRA or other qualified retirement benefits. Donors should consult with their tax advisor regarding the tax benefits of such gifts.*

Naming the PHASE ONE Foundation as the beneficiary of a qualified retirement plan asset such as a 401(k), 403(b), IRA, Keogh or profit-sharing pension plan will accomplish a charitable goal while realizing significant tax savings. It can be costly to pass these assets on to heirs because of heavy tax consequences. By naming the PHASE ONE Foundation as a beneficiary of a retirement plan, the donor maintains complete control over the asset while living, but at the donor's death, the plan passes to the PHASE ONE Foundation free of both estate and income taxes. Making a charitable gift from your retirement plan is easy and should not cost you any attorney fees. Simply request a change of beneficiary form from your plan administrator. When you are done, please return the form to your plan administrator and notify the PHASE ONE Foundation. We can also assist you with the proper language for your beneficiary designation to the PHASE ONE Foundation.

### Customized Language

If you or your attorney would like the PHASE ONE Foundation to provide you with customized beneficiary language that is specific to your goal and interest, please contact our office at (310) 458-7715

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