

# Lasting Legacy



## Securing Your Future, Making Your Mark

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### *Easing Burdens for My Family*

**by Carmen Briggs**



**Carmen Briggs and Sharman Greber**

**M**y older sister Rosa was always very good at taking care of herself, so her gradual withdrawal

from us in her later years was a drastic change. After her husband died, Rosa stopped going out as much. She scarcely saw her friends and family and even stopped answering the phone for our weekly calls.

Thanks to AARP Foundation, I had read about the problem of senior isolation in our country, and I tried to help Rosa get more involved in her community. But because she didn't drive

and public transportation was limited, it was almost impossible for her to get out.

It wasn't until after she died that I truly understood how much isolation can change someone. When Rosa died, she hadn't created a will. She'd always been organized and prepared, so it was shocking that she hadn't written a will. It has made things more difficult for me as I tried to manage her estate.

As I've worked to get her affairs in order, it has been stressful and difficult to imagine what she would want: what's fair to every member of our family, and how she would have chosen to distribute her assets.

I rest easier knowing that when it's my time, my family won't be

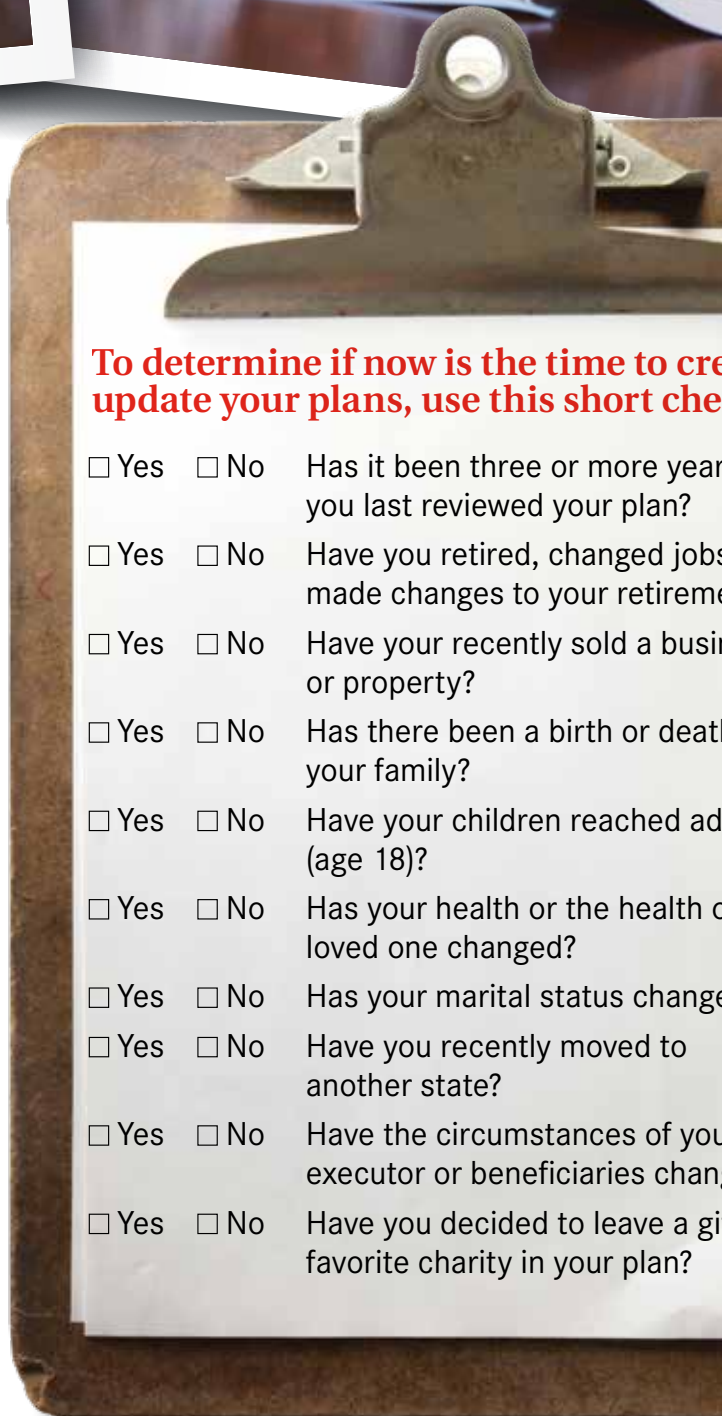
burdened with that additional stress. They will know my exact intentions because I created my will years ago. I also decided to leave some money to charity — and AARP Foundation was on the top of the list.

They are one of the only organizations working to address senior isolation. In a sense, leaving a gift to AARP Foundation is a way to honor my sister Rosa. If we can prevent others from experiencing what Rosa went through, I want to be a part of that. ■

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*Carmen Briggs lives in Nevada. She and her late husband, Andrew, have been supporters of AARP Foundation since 1988. She hopes that telling her sister's story will encourage others to plan ahead.*

**INSIDE:** Is It Time to Create or Update Your Will?



## Is It Time to Create or Update Your Will?

**H**ave you ever considered how you will be remembered by friends, family, and future generations? If you are like me, you probably want to be remembered as someone who made a difference, especially for vulnerable seniors in our country.

The best way to create your own legacy is to prepare a will. But for many of us, the task of creating or updating our will is one of those “to-dos” that always falls to the bottom of the list. It’s tempting to ignore this kind of planning, but you owe it to yourself and your family to be prepared.

If you answered “yes” to any of the questions on this checklist, it’s time to create or update your plan.

When you are updating your plans, please consider leaving a gift to AARP Foundation to join the fight to help end senior poverty for millions of older adults in this country.

### Benefits to You:

- Retain control of your assets during your lifetime
- Change your beneficiaries at any time
- Provide for loved ones and AARP Foundation
- Make your gift in honor or memory of someone special
- Leave a gift of any size

For additional information, we are glad to provide you with a complimentary copy of our *Writing Your Life Story* brochure. Request your copy by returning the enclosed reply form or call us 1-800-775-6776, option 6, or email us at [legacy@aarp.org](mailto:legacy@aarp.org). ■

### To determine if now is the time to create or update your plans, use this short checklist.

- Yes  No Has it been three or more years since you last reviewed your plan?
- Yes  No Have you retired, changed jobs, or made changes to your retirement plan?
- Yes  No Have you recently sold a business or property?
- Yes  No Has there been a birth or death in your family?
- Yes  No Have your children reached adulthood (age 18)?
- Yes  No Has your health or the health of a loved one changed?
- Yes  No Has your marital status changed?
- Yes  No Have you recently moved to another state?
- Yes  No Have the circumstances of you, your executor or beneficiaries changed?
- Yes  No Have you decided to leave a gift to your favorite charity in your plan?





## Summer of Service to Seniors<sup>SM</sup> Provides 3 Million Meals to Communities Across the U.S.

**S**ince 2015, thousands of volunteers have come together on the national mall in Washington, D.C. to pack meals for seniors struggling with hunger. This year, our Summer of Service initiative expanded the program to engage more communities in our effort to end senior hunger. Though it is often unseen, older adult hunger and food insecurity exist in every community in our nation. More than 10 million adults 50 and older are at risk of hunger every day. Senior hunger can lead to chronic diseases and acute medical conditions such as diabetes, heart disease and depression.

AARP Foundation is helping to meet the immediate daily food needs of hungry seniors, and working to establish permanent solutions to end senior hunger once and for all. This year's Summer of Service to Seniors brought our day-long meal packing events to Memphis, TN;

Denver, CO; the Twin Cities (Minneapolis/Saint Paul) in MN; and continued for our third year in Washington, DC.

Jami Wyatt, co-chair of the summer-long event shared, "We wanted to see the impact it would have, not just in terms of how many meals we could pack, but how many volunteers we could engage."

AARP Foundation President Lisa Marsh Ryerson added that the events also play a critical role in increasing awareness of the problem. She noted, "By expanding our Summer of Service to Seniors to four cities, we're calling attention to the fact that too many low-income older adults have to choose between buying groceries and other essentials, like medicine. The negative impact of hunger on a person's well-being is enormous."

All told, more than 3 million meals were packed, boxed and sent to area food banks. More

than 7,700 volunteers made this possible. For Wyatt, it was exciting to watch the number of meals increase throughout the day – but what really felt rewarding was seeing and talking to the volunteers. "Sometimes you'd have four generations of a family standing side-by-side, packing meals together," she said. "There would be an older person in a wheelchair, a middle-aged adult, a twenty-something, all the way down to the great-grandkid of four or five years old. It was inspiring."

One of the most powerful moments for Wyatt was meeting a single mom who had come to volunteer. "When she was disabled and unable to work, she had gone to the food bank herself to put food on the table. She was so grateful that she was able to give back to a program that had helped her during a hard time." ■

# Helpful Hints: 5 Tips for Traveling with Children



**T**raveling with your children or grandchildren is an excellent way of sharing your love of the world. But it isn't always easy to pack, negotiate airports or train stations, and adjust to new time zones with kids. Here are a few tips to make your travel go more smoothly:

1. Check immunizations, passports, and car seat needs at least 6 months before you leave.
2. Teach children basic words in the local language before arriving so they get excited about talking with people they will meet.
3. As much as possible, stick to the meal times, sleep

times, and play times they are used to at home. It is the best way to make sure your kids get enough rest and food so they can enjoy the sights and sounds.

4. Give the children a couple of options of where to go and what to eat to help them feel like they have some control over their day.
5. Be open to unplanned adventures so you can show the children the joy of the unexpected and maintain your sense of humor when things don't go as planned. ■

## Sample Language

To include AARP Foundation in your will, you may wish to share the following language with your estate planning attorney:

"I hereby devise and bequeath (insert a sum, percentage, specific property, or residue/remainder) to AARP Foundation, federal tax ID #52-0794300, a non-profit corporation in the District of Columbia, for its unrestricted charitable use and purpose."

## We're Here to Help

We are happy to answer any questions you may have about leaving a gift in your will, trust, or other estate planning documents. For more information about how you can make the lives we touch part of your lasting legacy, please call us at 1-800-775-6776, option 6, or email us at [legacy@aarp.org](mailto:legacy@aarp.org). We're here to help you create your legacy.



**Heather Sherman**



**Sharman Greber**



**Rob Drucker**



**Marva Thomas**

**Our Vision: A country free of poverty where no older person feels vulnerable.**

Poverty isn't a part of the American Dream. But for a startling number of older adults, it's a fact of life. AARP Foundation is disrupting the status quo and advancing bold solutions to the fundamental challenges that stand in the way of happier, more secure lives for seniors.

The information provided in this material is presented solely as general educational information and is not intended to be a substitute for professional estate planning or legal advice. As the laws regarding the validity and enforcement of wills or living trusts vary from state to state, you should seek the advice of your tax advisor, attorney, and/or financial planner to make certain a specific gift under consideration is compatible with your financial goals and needs and your estate plan. It is important to seek legal counsel in preparing these instruments. Any tax information contained in this document is not intended to be used, and cannot be used, to avoid any penalties imposed under the Internal Revenue Code.