



Retirement Plan Beneficiary Designation

Name American Farmland Trust as a Beneficiary of Your Retirement Plan

Support the protection of America's farmland and ensure your heirs' well-being by designating American Farmland Trust as a full or partial beneficiary of your IRA, 401(k), or other qualified retirement plans. The tax implications for your retirement assets may not be as you initially thought. In fact, by donating your retirement assets and allocating other assets to your heirs, you may be able to provide more for your heirs in the end. This approach presents a win-win situation for your beneficiaries and the future of farmland conservation.

How It Works

- **Advisor Consultation:** Your financial advisor and American Farmland Trust gift planning professionals can help you determine whether income from a gift plan or withdrawals from your retirement account would most benefit your heirs. For more information, contact one of our gift-planning experts.
- **Beneficiary Designation:** You name American Farmland Trust as the beneficiary of a qualifying retirement plan through a beneficiary designation form, ensuring assets will not be included in your taxable estate. An extra step may be required to designate a 401(k).