



## LEGACY CIRCLE



# Breaking through Barriers

### MAKE A COMMITMENT TO AN EQUITABLE FUTURE FOR WOMEN AND GIRLS

Become a member of the AAUW Legacy Circle by making a planned gift to AAUW and a commitment to the future of women and girls.

Planned gifts generate a legacy of opportunities for women and girls by expanding AAUW's programs and public policy agenda.

AAUW seeks to increase the number, scope, and size of the gifts that form the long-term financial reservoir for our important work. Members of the Legacy Circle have begun that expansion through their planned gifts.

### RECEIVE THE EXCLUSIVELY DESIGNED LEGACY CIRCLE PIN



Given as a gift to members of Legacy Circle, the Legacy Circle pin is a meaningful symbol of the generosity and commitment of Legacy Circle members to the future of women and girls.

Designed by Swarovski of North America, the pin is a gold wreath adorned with pavé crystals and trimmed with a gold ribbon that proudly proclaims, "A Legacy of Equity." At the base of the wreath is an open book with a suspended pearl.

### TELL AAUW ABOUT YOUR PLANNED GIFT TODAY

To enroll in the Legacy Circle and receive your pin, complete the form in this packet and return it to the AAUW Development Office, Attn: Planned Giving, 1111 Sixteenth St. NW, Washington, DC 20036.

### QUESTIONS?

If you have questions, contact Carol Rognrud, senior development officer, at 202/728-7627 or rognrudc@aauw.org.



# LEGACY CIRCLE MAKING A BEQUEST TO AAUW



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Consult an estate-planning professional to ensure that your will meets all legal requirements. Sample bequest language is given below.

### AAUW

After fulfilling all other provisions, I hereby give, devise, and bequeath to AAUW (Federal Tax ID #52-6037388), a charitable organization duly existing under the laws of the District of Columbia and located at 1111 Sixteenth St. NW, Washington, DC 20036, \_\_\_\_\_ percent of the rest, residue, and remainder of my estate or \$\_\_\_\_\_ [if specific amount] to be used in the areas of greatest need as the board of directors may determine.

**Note:** Because the IRS recognizes AAUW as a 501(c)(3) nonprofit organization, bequests are excluded from your adjusted gross estate for estate tax purposes.

### QUESTIONS?

If you have questions or wish to fulfill a special intention with your bequest, contact Carol Rognrud, senior development officer, at 202/728-7627 or rognrudc@aauw.org.



# LEGACY CIRCLE ENROLLMENT FORM



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## BENEFICIARY: AAUW

TODAY'S DATE \_\_\_/\_\_\_/\_\_\_

NAME \_\_\_\_\_ DATE OF BIRTH \_\_\_/\_\_\_/\_\_\_

STREET ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

BRANCH/STATE \_\_\_\_\_ PHONE \_\_\_\_\_

*Please complete the information below to the extent you are comfortable. This information helps AAUW leadership plan for the future, but it is **not a requirement** of membership in the Legacy Circle.*

## I HAVE PROVIDED A GIFT THROUGH MY ESTATE PLAN USING THE FOLLOWING METHOD:

AMOUNT OR CURRENT  
ESTIMATED VALUE (OPTIONAL)

1. AN OUTRIGHT BEQUEST IN MY WILL OR LIVING TRUST

A. PERCENTAGE/SHARE OF ESTATE ( \_\_\_\_\_ %) \$ \_\_\_\_\_

B. SPECIFIC DOLLAR AMOUNT \$ \_\_\_\_\_

C. PROPERTY DESCRIPTION \_\_\_\_\_ \$ \_\_\_\_\_

2. A BENEFICIARY DESIGNATION OF MY IRA, 401 (K), OR KEOGH \$ \_\_\_\_\_

3. PLEASE CHECK ALL THAT APPLY:

MY GIFT MAY BE USED IN THE AREAS OF GREATEST NEED AS THE BOARD OF DIRECTORS MAY DETERMINE, OR

I WOULD LIKE MY GIFT DESIGNATED TO \_\_\_\_\_.

I AUTHORIZE MY NAME TO BE LISTED AS A LEGACY CIRCLE MEMBER, OR

I PREFER TO BE LISTED ANONYMOUSLY.

I AUTHORIZE THE PUBLICATION (AT MY DEATH) OF MY BEQUEST FOR LEGACY RECOGNITION.

YOUR SIGNATURE \_\_\_\_\_

**Thank you for your commitment to and support of AAUW.**  
Return this form to AAUW Development Office, Planned Giving,  
1111 Sixteenth St. NW, Washington, DC 20036.  
If you have questions, contact Carol Rognrud, senior development officer,  
at rognrudc@aauw.org or 202/728-7627.

The above information about your planned gift is confidential, nonbinding, and for internal accounting purposes only.



# LEGACY CIRCLE ESTABLISHING NAMED FELLOWSHIPS AND GRANTS



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TYPE	ESTABLISHMENT CONTRIBUTION	COMPLETION LEVEL	TIME FRAME
AMERICAN FELLOWSHIP	\$10,000	\$200,000	15 YEARS
INTERNATIONAL FELLOWSHIP	\$10,000	\$200,000	15 YEARS
RESEARCH AND PROJECTS GRANT	\$5,000	\$75,000	10 YEARS

## FIRST STEPS

To establish a fellowship or grant, send the appropriate establishment contribution (see above), the completed establishment form, and, when honoring or remembering an individual, a biographical summary of the honoree.

## BOARD APPROVAL

The AAUW Board of Directors meets twice a year, in the spring and fall. AAUW must receive contributions and establishment forms approximately one month before the board meeting to be considered. After the board approves the request, the AAUW branch or state contact will receive a letter indicating the approval date, the date the fellowship or grant is expected to be completed, and the fund number. Please include the fund number and fellowship or grant name on all correspondence with AAUW.

## ESTABLISHED FELLOWSHIPS AND GRANTS

When you send contributions for established fellowships or grants, you must include the name or number of the fellowship or grant to ensure that contributions are designated correctly.

## QUESTIONS?

If you have questions, contact Kristie Malley, manager of major and planned giving, at 202/785-7766 or [kristie.malley@aauw.org](mailto:kristie.malley@aauw.org).

*“I have come to realize the high regard academics have for AAUW fellows, which leads me to believe that this fellowship will distinguish me from other postdoctoral fellowship and job applicants. Through the network of AAUW members, I have the opportunity to develop professional and collaborative relationships that could be valuable resources in the academy.”*

—Agatha Beins, 2009–10 American Fellow