



## **AAUW National Legacy Circle Frequently Asked Questions**

### **Q. What is the Legacy Circle?**

A. The Legacy Circle is AAUW's way of recognizing donors who have included AAUW National in their estate plans with a planned gift.

### **Q. How do you join the Legacy Circle?**

A. Once you have decided to include AAUW National in your estate plans, discuss your intention with a trusted advisor. You may also want to talk through your options with the National Legacy Circle Liaison assigned to your state or with our knowledgeable gift-planning staff.\* As soon as you have made the necessary arrangements, complete the Legacy Circle enrollment form, sign it and send it to:

AAUW, Planned Giving Office, 1310 L St. NW, Suite 1000, Washington, D.C., 20005

### **Q. Is there a minimum amount you must leave to AAUW to qualify?**

A. No. AAUW does not require you to disclose the amount of your donation, as stated on the Legacy Circle enrollment form. Your gift should reflect your commitment to AAUW. As you make your plans, we hope that you consider the importance of AAUW's work, the significance of AAUW in your life and your hopes for the future. We ask that you be as generous as possible.

### **Q. Do I have to be wealthy to join the Legacy Circle?**

A. Absolutely not. Regardless of your income, you can take care of family first while also including AAUW in your plans. There are even planned gifts designed to pay you income for life while giving back to AAUW. Read on to learn more about charitable gift annuities (CGAs).

### **Q. Can I include AAUW in my will and choose to remain anonymous?**

A. Yes. While we're always delighted to thank and celebrate new members of the Legacy Circle, we always respect the confidentiality of donors who opt to join the Legacy Circle anonymously. When considering your options, please note that the simple act of AAUW welcoming you to the Legacy Circle may inspire others to make their own legacy plans.

### **Q. Are there benefits associated with the Legacy Circle?**

A. All Legacy Circle members receive a special Legacy Circle pin designed by Swarovski exclusively

*(Over)*

for AAUW as a tangible symbol of their generosity and commitment. Legacy Circle members' names are also included in special recognition lists and select AAUW publications. Legacy Circle members may receive invitations to exclusive online events as well.

**Q. Can I leave my gift to a specific program or area of interest within AAUW?**

A. While we're grateful for every gift we receive, we strongly prefer unrestricted donations, which offer AAUW the flexibility to use funds where they're needed most at any given time. Restricted gifts are just that ... restrictive. There is no way of knowing if your favorite program will still exist when your estate is settled. To avoid costly legal battles to determine your intent, an unrestricted gift to AAUW's Greatest Needs Fund will do the most good for women and girls in an unknowable future.

**Q. Are there other ways to join the Legacy Circle without including AAUW in my will?**

A. Yes! There are many ways to leave a legacy gift to AAUW—which is why a conversation with your Legacy Circle Liaison or the AAUW Advancement staff may be helpful. For example, in addition to a will or living trust, you can name AAUW as beneficiary of a donor-advised fund, an IRA or other retirement plan. Other options include gifting stocks or securities, a life insurance policy or real estate, or opening a Charitable Gift Annuity (CGA).

**Q. What is a Charitable Gift Annuity (CGA)?**

A. A CGA is an annuity to which you make a gift and receive guaranteed, fixed payments for life. Unlike other Legacy Circle gifts, a CGA requires a minimum donation of \$10,000 and is only available to those 75 years of age or older. Younger members might consider a deferred CGA. In either case, we recommend that you have a conversation with your Legacy Circle representative and/or the Planned Giving staff. CGAs are not available in all states.

*\* Please contact AAUW National's gift planning staff at 202-785-7766 or via email at [planned-giving@aauw.org](mailto:planned-giving@aauw.org). Additional information about legacy giving at AAUW is available on the website and in the Legacy Circle brochure. Visit <https://www.aauw.org/legacy>.*

**We invite you to join the AAUW Legacy Circle today with a special planned gift. Make your core values known by supporting the long-term success of the organization you love. We hope you will consider including AAUW as an important part of your legacy.**

---

The information provided herein is not intended as legal or tax advice. Please consult a trusted advisor or financial planning professional to determine how specific rules may apply in your situation.