



# Frequently Asked Questions

## What is the Legacy Circle?

The Legacy Circle is AAUW's way of recognizing donors who have included **AAUW National** in their estate plans with a planned gift. The Legacy Circle does not recognize planned gifts made to AAUW states or branches.

## Do I need to be a member of AAUW to join the Legacy Circle?

No, AAUW is grateful for and celebrates support from members, alumnae and non-members.

## How do you join the Legacy Circle?

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 planned giving staff in the National Office.

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*

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

There is no minimum amount and AAUW does not require you to disclose the amount of your donation. 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 and will celebrate a gift of any size.

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

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).

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

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.

## Are there benefits associated with the Legacy Circle?

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

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

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 have the greatest impact for women and girls in an unknowable future.

## What are the different ways to make a planned gift?

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. Planned Gifts at AAUW include:

- **Bequests:** A bequest is a gift that is made through a will or living trust. Bequests can be made as a percentage of an estate, a specific dollar amount, or a specific asset. Bequests can be unrestricted or restricted to a specific purpose.
- **Retirement plan assets:** Retirement plan assets, such as an IRA or 401(k), can be donated to AAUW. This can be a tax-efficient way to make a charitable gift.
- **Life insurance:** Life insurance policies can be donated to AAUW. This can be a tax-efficient way to make a charitable gift.
- **Charitable gift annuities:** A charitable gift annuity is a contract between the donor and AAUW. The donor makes a gift to AAUW (minimum \$10,000) in exchange for fixed payments for life. Donors must be 75 or older to set up an AAUW charitable gift annuity. Donors who are not 75 could consider a deferred Charitable Gift Annuity.
- **Charitable remainder trusts:** A charitable remainder trust is a trust that pays income to the donor for a specified period of time, after which the remaining assets are donated to AAUW.
- **Charitable lead trusts:** A charitable lead trust is a trust that pays income to AAUW for a specified period of time, after which the remaining assets are returned to the donor or passed on to heirs.

More information is available at <https://www.aauw.org/resources/member/support-aauw/leave-a-legacy/>

## How can I join the National Legacy Circle Liaison Team?

If you are currently a Legacy Circle Member and would like to expand your impact by recruiting, welcoming and stewarding planned gifts at AAUW then please contact AAUW National's Planned Giving Office.

## Contact Us

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.

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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.