

Welcome



- This meeting will be recorded
- The recording and this PDF will be posted on the **AAUW Peer Group Webpage**
- Please mute your Speaker during the presentation
- Questions will be addressed at the end of the meeting
- Please use the Chat to “everyone” for questions
- Please unmute when asking a question

AAUW CA Fund Peer Group

November 18, 2025

**The Nuts and Bolts of
The Legacy Circle
... and more**



AAUW CA Fund Committee

**Chair: Deanna Arthur, AAUW CA Director, Alhambra-San Gabriel,
email: aauwfund@aauw-ca.org**

Committee Members:

- ❖ **Tobi Balma, Long Beach, La Palma-Cerritos, Greater Whittier, CA Online
email: aauw.tobi@gmail.com**
- ❖ **Cheryl Plotkin, Alhambra-San Gabriel
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- ❖ **Mary Jane Sanchez-Fulton, Coachella Valley
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- ❖ **Rhonda Dotta, Lodi
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What We Will Cover

- **Legacy Circle**
- **Five Star Program**
- **Current AAUW Funds on AAUW Donate Page
(in addition to the Greatest Needs Fund)**
- **AAUW Fund CA Branch Endowments
How to locate recipients**
- **Fundraising Open Discussion
Fiscal Year Donations Due Dec. 31st
Ideas and Successes**
- **Q&A Open Forum**

AAU 
*Legacy
Circle*

Leave a Legacy, Empower the Future





Leave a Legacy, Empower the Future

**Gift Bequests to AAUW
Via Your Will, Trust or Estate That
Keep on Going Even After You're Gone!**

**Join the Legacy Circle and support
equity for women and girls for generations**



Standing together for equity

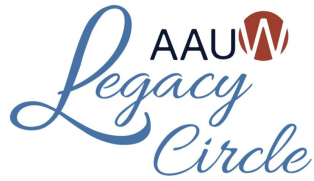


Why Join the Legacy Circle?

Benefits of Joining:

- ✓ **Flexibility** – Choose a giving option to fit your financial goals.
- ✓ **Tax Advantages** – Potential savings on estate, income, or capital gains taxes.
- ✓ **Financial Planning** – Some planned gifts provide income to you or your loved ones.
- ✓ **Enduring Impact** – Sustain our work on advocacy, education, and economic security for years to come.



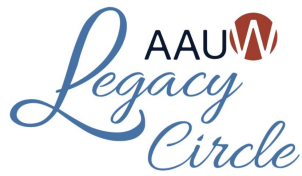


Leave a Legacy, Empower the Future

There is no minimum gift requirement to join the Legacy Circle, and the benefits are many. For example:

- Planned gifts afford you flexibility to provide for your family and support AAUW.
- Certain planned gifts may reduce estate or capital gains taxes.
- Planned gifts need not affect your cash flow during your lifetime.





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- Certain types of planned gifts allow you to support AAUW while also providing income for the rest of your life – or a fixed income for a loved one.
- The joy of knowing that your legacy gift will sustain AAUW's programs for years to come is the ultimate benefit!
- Receive custom communications, invites to special events, and public recognition in AAUW National publications.



Planned Giving Options



Bequests (Most Flexible Option)

- Designate AAUW in your **will or revocable trust** to receive a specific dollar amount, asset, or percentage of your estate.
- **Age Requirement:** None.
- **Restrictions:** Can be changed at any time.
- **Benefit: Simple to establish** and remains revocable during your lifetime.



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Planned Giving Options



Beneficiary Designations (Retirement Accounts & Life Insurance)



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- Name AAUW as a **beneficiary of your IRA, 401(k), 403(b), life insurance policy**, or other retirement accounts.
- **Age Requirement:** None.
- **Restrictions:** Requires a simple beneficiary form update with your provider.
- **Benefit:** Avoids probate, and retirement assets left to charities bypass income taxes.



Planned Giving Options



Charitable Gift Annuities (CGA) – Income For Life



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- Transfer assets to AAUW and **receive fixed lifetime payments** based on your age.
- **Age Requirement:** Minimum age 65 for payments to begin.
- **Restrictions:** Minimum gift amount required (\$10,000+).
- **Benefit:** Immediate **tax deduction** and **guaranteed lifetime income.**



Planned Giving Options



Charitable Lead Trusts (CLT) – Immediate AAUW Impact



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- A trust pays **income to AAUW for a set time**, then the remaining assets pass to heirs at a reduced tax rate.
- **Age Requirement:** None, but often used for **family wealth transfer**.
- **Restrictions:** Requires legal setup.
- **Benefit:** Provides **estate tax benefits** while **supporting AAUW now**.



Planned Giving Options



Charitable Remainder Trusts (CRT) – Income Now, Gift Later

- Set up a trust that **pays you or a loved one an income** for life or a term of years, then leaves the remaining funds to AAUW.
- **Age Requirement:** Typically 50+.
- **Restrictions:** Requires legal setup and trustee management.
- **Benefit:** Income stream, reduced **capital gains taxes**, and **charitable tax deduction**.



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Planned Giving Options



Real Estate Gifts (Home, Land, or Rental Properties)

- Donate real estate outright, place it in a **charitable trust**, or establish a **retained life estate** (continue living in your home while securing a future gift).
- **Age Requirement:** None.
- **Restrictions:** Property must be assessed for suitability.
- **Benefit: Avoids capital gains taxes** and may provide an **immediate tax deduction.**



Leave a Legacy, Empower the Future



Your Legacy Makes a Difference

Join today to receive tailored communications, invitations to special access events, and public recognition in various AAUW National publications.



Learn more or join:



planned-giving@aauw.org



bit.ly/LegacyAAUW



Scan the QR code with your
phone camera:





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One can enroll in the Legacy Circle by
Completing the Online Form
Or filling out the form on the Website
<https://www.aauw.org/resources/member/ways-to-give-aauw/leave-a-legacy/>

*To learn more, contact AAUW staff
at planned-giving@aauw.org.*

Please consult with a tax advisor or financial professional before making a decision about planned giving. As stewards in philanthropy, we want to ensure you are fully informed about your giving options.





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ENROLLMENT FORM

Mail or Email this form to:
1310 L St. NW, Suite 1000
Washington, DC 20005
ATTN: Advancement
planned-giving@aauw.org

Date :
D D M M Y Y Y Y

Personal Information

Full Name :

Date Of Birth :
D D M M Y Y Y Y

Address Street :

City : State :

Zip : Country :

Email : Phone :

I would like to be recognized in the following Branches and States:

I would like to appear as "anonymous" You may include my/our name(s) in public recognition as a member of the Legacy Circle.

I have provided a gift through my estate plan using the following method:

Please fill in the information below to the extent that you are comfortable sharing. Any information provided is strictly confidential.

WILL REVOCABLE LIVING TRUST
 RETIREMENT FUND BENEFICIARY CHARITABLE GIFT ANNUITY
 OTHER TRUST LIFE INSURANCE POLICY BENEFICIARY

This gift is:

A PERCENTAGE OF THE RESIDUARY OF MY ESTATE, TRUST, OR RETIREMENT PLAN %
 A GIFT OF A SPECIFIC AMOUNT \$
 A GIFT OF A SPECIFIC ASSET ASSET TYPE:

PLEASE ADD ANY ADDITIONAL DETAILS YOU WISH TO SHARE:

AAUW MEMBER : Yes No
BRANCH :

Suggested Language for your attorney:
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 1310 L St. NW, Suite 1000, Washington, DC 20005, _____ percent of the net, 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.

Signature

THANK YOU FOR YOUR COMMITMENT TO AAUW



Standing together for equity



Reminder:
Recruiting at least one
Legacy Circle Member
from your branch
in FY 26 counts as
one of three criteria for a
Star in the
Advancement Category

THE AAUW PROGRAM

- Raise \$30 per member in FY26 towards the Greatest Needs Fund
- Increase contributions to the Greatest Needs Fund by 15% from the last fiscal year
- Increase the number of individual donors compared to the previous fiscal year
- Make a branch contribution to the Defend Higher Education (4513) or Public Policy Funds (4514)
- Recruit at least one Legacy Circle member from your branch in FY26

Preferred Restricted Funds for 5 Star Program

4513 – The Defend Higher Education Fund will enable AAUW to elevate the critical higher education issues impacting women, mobilize advocates across the country, provide strategic resources to students, staff and faculty on campus, and fuel investments in the infrastructure and technology necessary to move our mission forward.

4514 - Public Policy General is focused on increasing the impact of our Action Network through growing the number of advocates across the country and providing timely, accurate, and actionable information about our key issues. This fund helps equip branches across the country with timely, customized talking points on core policy issues like Title IX, student debt, and pay equity. Support to this fund enables AAUW to reach and energize new advocates—strengthening our collective impact in the fight for gender equity in education and the workplace.

AAUW FUND

CA SPONSORED ENDOWMENTS

- Endowments Sponsored by Branch Names
- Other Endowments
- AAUW National Recipient Directory
(<https://my.aauw.org/fellowshipsandgrantsdirectory>)
- AAUW Legacy Directory prior to 2023 - 2024
(https://www.aauw.org/fellowships_directory/)

Fundraising Ideas and Successes



Fundraising Ideas

“Oldies but Goodies”

- A MOCK HIGH SCHOOL REUNION
- ANTIQUES APPRAISAL EVENT
- ART AND WINE WALK AND OTHER ART EVENTS
- AUTHORS’ LUNCHEON, After lunch, various authors
- BOOK SALES
- BRIDGE TOURNAMENTS AND OTHER GAME TOURNAMENTS
- DINING AT VARIOUS RESTAURANTS
- DINNER AND TRIVIA BEE
- HOME TOURS
- NON-EVENTS
- TEA PARTIES
- TRICK OR TREAT FOR AAUW
- VARIOUS FUNDS LESSONS FOR DONATIONS

Next Steps

Future Topics of Interest?

Save the Dates!

Register on the [AAUW CA Calendar](#) for
Upcoming AAUW Fund Peer Group Meetings
March 10, 2026, and April 28, 2026.

These meetings will also be held on Tuesdays at 7 pm.



Questions



Resources

AAUW CA Fund Peer Group (includes meeting dates, videos and pdf slide shows of past Peer Group Meetings)

- **<https://www.aauw-ca.org/aauw-california-peer-groups/>**

[AAUW CA Fund Webpage](#)

[AAUW CA Fundraising Guidelines](#)

[National AAUW Fundraising](#)

[Policies](#)

[Fundraising Ideas](#)

[Fellowships & Grants Directory](#)

[AAUW Help Desk \(support@aauw-help.freshdesk.com\)](#)

[Legacy Circle \(CA Webpage\)](#)

[Legacy Circle Brochure](#)

[Legacy Circle Enrollment Form](#)

[Planned Giving Ways to Give](#)

[Planned Giving AAUW Staff Information](#)

[Fellowships & Grants Legacy Directory](#)

[Fund Recipient information](#)

Thank You!

