

A photograph of the interior of a grand, ornate theater with multiple tiers of red seats and gold-colored architectural details. The title "The Legacy Circle" is overlaid in white text.

The Legacy Circle



Planned Giving

APT Successes

Since its founding in 1968, APT and its reputation and influence have grown significantly. Now with members in nearly 30 countries and 21 chapters across the world, APT is considered a major voice of authority in the world of preservation. Did you know:

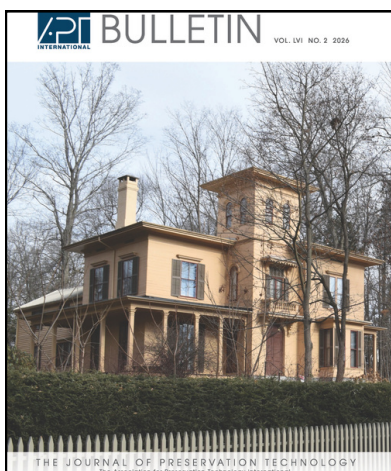
For over 50 years [The APT Bulletin](#), our peer-reviewed journal, has been a key, reliable source of information on preservation technology, materials, practice, and the history and evolution of building technology. We've published over 1,300 articles – that's about 11,000 pages! Through the online platform JSTOR, Bulletin articles have been read in 193 countries and at over 7,000 institutions.



APT's [Annual Conference](#) has grown. We now regularly draw over 800 international attendees to participate in hands-on workshops, and nearly 80 presentations. Thanks to existing foundation and individual support we subsidize students and professionals from across the globe to attend and grow APT. And we now have two emerging professionals as full voting members of the APT Board of Directors, part of our effort to foster a new generation of leadership.

The breadth of [APT's activities](#) continues to flourish. With 21 active committees, we play an influential role in contemporary preservation challenges such as: sustainable preservation and climate change impacts on historic resources, building codes, and the preservation methods of modern heritage. We developed educational curriculum that use preservation technology as its core, as well as a Disaster Response Initiative. Students and emerging professionals are increasingly active throughout the organization. Our work continues to grow as do our relationships with preservation organizations around the world.

APT's strength and continued successes depend on your support. Your participation in one of the many planned giving options described here is one way you can make sure the successful path of APT continues



Giving Options

Bequests: The most popular legacy gift to support the preservation technology work of the APT is a bequest in a member's will or trust. Bequests allow donors to focus on current financial obligations, while also providing critical support to future preservation efforts. A bequest could be a gift of a specific dollar amount or other specific assets or a percentage of your estate. Your attorney can provide guidance about adding language through a simple codicil or amendment to your existing estate planning documents.

Retirement Plan Giving in the Future: Did you know that you can make APT a beneficiary of your retirement plan? By giving your retirement plan to APT at your death, the assets will avoid US estate tax, and APT will not be required to pay income tax when it receives distributions from the plan.

Retirement Plan Giving Today: In the U.S., donors aged 70½ or older may contribute up to \$110,000 per year to charity from their Individual Retirement Accounts (IRAs). These so-called "qualified charitable distributions" (QCDs) must be made directly from the IRA to the charity, and while they do not qualify for a charitable income tax deduction, you as the IRA owner are not required to recognize the QCD in your taxable income, as would be the case if you had received the distribution from the IRA and then made a gift to charity. In most cases, QCDs will also count towards satisfying a donor's required minimum distribution (RMD) for the tax year in which they are made. This can be a tax-wise way to handle RMDs that benefit you while also supporting APT.

Life Insurance: If you have a life insurance policy you no longer need, you could consider changing the ownership and benefits (beneficiary) to APT. The policy's death benefit will avoid any applicable estate tax, and you could qualify for a current charitable income tax deduction.

Real Estate: The gift of your home is a unique and meaningful way to support APT. You can make an outright gift, or you may retain the right to live in your home for the rest of your life, or until the death of the survivor of you and your spouse (paying the carrying costs for the property), after which the property will pass to APT. The property owner may be eligible to receive a current charitable income tax deduction for the present value of the remainder interest passing to APT, and also avoid estate taxes on the property. Commercial real estate and vacant land can also be used for lifetime gifts or bequests to APT, and there are several tax-advantaged structures that can be used with lifetime gifts that can provide financial benefits to both APT and the donor.

Gifts of Securities: Donating appreciated securities or mutual funds can be a tax-wise and simple way to help support your passion for advancing preservation technology. If you hold publicly traded stock that has appreciated significantly since you purchased it, there is often no better way to maximize its benefit to you and its impact than through a charitable donation. A gift of appreciated stock can provide the donor a "two-fer": a charitable gift deduction for the full value of the stock, and elimination of capital gains tax on the appreciation.

Charitable Gift Annuities: Give a gift that gives back. Gift annuities are simple contracts between the donor and APT. You can transfer cash or appreciated securities in exchange for fixed payments for life. You continue to receive returns on the principal. You may also qualify for an income tax deduction. Most importantly, your gift will support preservation technology for future generations.



Curious about Any of These Tools that Benefit You and APT? Want to Learn More?

APT's team is eager to speak with you about how your giving can advance the mission and goals of APT, help save historic places and communities nationwide, and potentially be a financially wise move for you. **You can reach us through our Executive Director, Greg Galer - greg@apti.org.**

He would be happy to explore how you can help APT and how you may benefit from a legacy contribution. Consider it an opportunity to explore if one of these tools might be right for you and a great way for you to support APT. Our goal is to build APT's General Endowment, but we would be happy to discuss gifts focused on other current APT activities.



APT Giving Commitment Form

I have decided to make a commitment to APT. I believe in APT's work and want to leave a legacy that gives back to the organization and supports its continued success. I recognize that donations today as well as commitments today for a gift in the future ensure that APT's mission of promoting preservation technology and education continues for generations to come.

First and Last Name: _____

Email Address: _____

Telephone Number: _____

- ☐ I have included APT in my estate plan. I'd like to share information with you, so you are aware.
- ☐ I intend to include APT in my estate plan and want to finalize the plans.
- ☐ I would like additional information on how I might include APT in my estate plan.
- ☐ I would like to make a gift to APT today in the following amount.
- ☐ \$50 ☐ \$100 ☐ \$250 ☐ \$500 ☐ \$1,000 ☐ _____ (other)

**** PLEASE RETURN TO APT ****

Fill out and scan and email to
administration@apti.org

Or send by mail to: The Association for Preservation Technology
1930 18th Street NW, Suite B2, #1153
Washington, DC 20009