



# Legacy Society

A community of ASAE Research Foundation donors who have committed to supporting the association community in their long-term plans through a planned gift pledge of at least \$15,000.

Each donor designates where they entrust their planned commitment within the ASAE Research Foundation aligning to the key verticals of research, scholarships and grants within our mission and gain greater access to advancing the future of the association industry.

Honoring the extraordinary individuals who have left a legacy to the association community with the ASAE Research Foundation through bequests, trusts, and other life income gifts.

## Legacy Society Members

Gregg B. Balko, Fellow Emeritus  
Catherine A. Brown, FASAE, CAE  
Mona Buckley, MPA, CAE  
Garis F. Distelhorst  
Matthew D’Uva, FASAE, CAE  
Erin Fuller, FASAE, CAE  
Elena Gerstmann, PhD, FASAE, CAE  
Richard B. Green, CASE, FASAE  
Brian Haney CLTC, CFBS, CFS, CIS, LACP,  
LUTCF, RFC, CAE  
Pamela Hemann, FASAE, CAE  
Sheri L Jacobs FASAE, CAE  
Jenn Jones, MS, IOM, CAE

Gary A. LaBranche, FASAE, CAE  
Christina Lewellen, MBA, CAE  
Liz Erikson Marnul  
Ginger Nichols, Fellow Emeritus  
Rob Olcott, FASAE, CAE  
Lynda J. Patterson, FASAE, CAE  
Stephen E. Peeler, CFRE, FCEP  
Charles M. Robinson  
Sheri Sesay-Tuffour  
Jodie Slaughter, Fellow Emeritus  
Susan Bitter Smith, FASAE, CAE  
Irving W. Washington, FASAE, CAE  
Jay Younger, FASAE

## In memoriam

Curtis C. Deane, CFRE, CAE  
Gene Fondren  
J. David Moses Rozsa, FASAE, CAE

## Join Us

The ASAE Research Foundation will provide donors with a premium slate of planned giving offerings in the Legacy Society giving circle. This will allow donors the opportunity to customize the legacy they wish to leave behind in the association community with flexibility in creating their estate planning portfolio. The Society will provide donors with recognition based on a threshold pledge of \$15,000.

All Legacy Society donors will receive the following base annual benefits:

- Invitation to pinning ceremony of new Legacy Society donors

- Donor listing in quarterly e-newsletter
- Donor listing on ASAE Research Foundation virtual donor wall
- Annual Legacy Society exclusive Town Hall with ASAE President and CEO, Michelle Mason, FASAE, CAE, and ASAE Research Foundation Board Members for a strategic update on the Foundation
- Donor recognition by the ASAE Research Foundation at the ASAE's Annual Meeting & Exposition
- Complimentary invitation to attend the opening keynote VIP Q&A at ASAE's Annual Meeting & Exposition
- Complimentary ticket to ASAE Research Foundation's VIP Classic at ASAE's Annual Meeting & Exposition

## Why Join the Legacy Society?

### Leave a Gift to the Future

Your pledge will sustain quality future-focused research, professional development, and career advancement opportunities for the association community and professionals in need. This allows you to support the association industry, just as it has supported you throughout your career.

### Donor Tax Savings/Deduction

The amount you give to the foundation is not subject to federal estate tax, helping your family avoid additional income taxes. If you have a taxable estate, your gift can provide significant estate tax savings or deductions.

### Flexible Benefits

You have full control over your pledged contributions, deciding where your funds will be allocated within the ASAE Research Foundation. You can also adjust your donation amount at any time.

## Legacy Society Giving Options

- **Traditional:** submitting a bequest through your will
- **Insurance:** submitting a beneficiary update form with a permanent policy (Life insurance or annuity)
- **Asset-based:** Submit updated beneficiary form - cash, savings, retirement accounts (Payable on Death/POD, Transfer of Death/TOD)
- **Strategic Planning:** CRATs CRUTs, Trusts & Estate Planning
- **Estate Acceleration:** including an allocation within the trust of a percentage of estate capital



With your generous pledge, you will receive a **Legacy Society** pin.

## Contact Us

The ASAE Research Foundation is ready to partner with you today to support you as you explore your options in leaving behind the legacy you wish in the association community with flexibility in creating the estate planning portfolio that aligns with your values.

If you have already included the ASAE Research Foundation in your estate plans, please let us know. We would like to thank you for your generosity, make sure the purpose of your gift is understood by the foundation, and extend exclusive opportunities and resources to you.

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**Travis Major**  
Associate Director,  
Development Operations and  
Donor Relations  
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