asae research foundation

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 and scholarships 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

Lowell Aplebaum, EdD, FASAE, CAE
Gregg B. Balko, FASAE
Danielle Duran Baron, FASAE, CAE
Catherine A. Brown, FASAE, CAE
Mona Buckley, MPA, CAE
Henry Chamberlain, APR, FASAE, CAE
JJ Colburn, CAE
Jeffrey CuFaude
Garis F. Distelhorst
Matthew D'Uva, FASAE, CAE
Erin Fuller, FASAE, CAE
Elena Gerstmann, PhD, FASAE, CAE
Nabil El-Ghoroury, PhD, CAE
Jefferson C. Glassie, FASAE
Richard B. Green, CASE, FASAE
Brian Haney CLTC, CFBS, CFS, CIS, LACP, LUTCF, RFC, CAE
Pamela Hemann, FASAE, CAE
Sheri L Jacobs FASAE, CAE
Kathryn Johnson, MS
Charlie Jones, FASAE, CAE
Jenn Jones, MS, IOM, CAE
Gary A. LaBranche, FASAE, CAE
Christina Lewellen, MBA, CAE
Bob London, FASAE, CAE
Martha Malone, CAE
Liz Erikson Marnul
Patricia Montague, FASAE, CAE
Bob Moore, FASAE, CAE
Ginger Nichols, FASAE
Rob Olcott, FASAE, CAE
Lynda Bouchard Patterson, FASAE, CAE
Stephen E. Peeler, CFRE, FCEP
Paul Pomerantz, CAE, FASAE, FACHE
Charles M. Robinson
Sheri Sesay-Tuffour, PhD, FASAE, ICE-CCP, IOM, CAE
Jodie Slaughter, Fellow Emeritus
Susan Bitter Smith, FASAE, CAE
Jill Treby, CAE
Irving W. Washington, FASAE, CAE
Jay Younger, FASAE

In memoriam

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

foundation.asaecenter.org/supporters/giving-circle/legacy-society

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
- For Retired Members Only: Complimentary ASAE Membership as a retiree

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 & Estate Planning Resources
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.

Estate planning resources and trusted experts are available to help guide you as you explore your future financial plans.

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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Please scan for more information

foundation.asaecenter.org/supporters/giving-circle/legacy-society