

## WHAT IS PLANNED GIVING?

Very simply it is giving what you want when you want to the programs you want to support.

Planned giving can be as simple as:

- making a donation each year
- making provisions in your will
- making provisions in your living (revocable) trust
- setting up and annuity account
- donating stock

*People aren't remembered for what they had. They are remembered for what they gave.*

*- Zachary Fisher*

## AEG Foundation

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## Planned Giving

AEG Foundation



## You Earned It, You Saved it, and Now...



Being an applied geologist is a rewarding life in many ways. We are passionate about our profession, and for good reason. And many of us want to “give back” to our profession to ensure that future generations of applied geologists continue to work in ways that benefit the public.

## The Benefits of Planned Giving

Planned giving puts you in control of your charitable giving. A donor-advised fund can make gifts automatically on a schedule you choose, or it can allow you to give on an intermittent basis if you wish. You control the disbursements.

Planned giving funded with appreciated assets can confer tax benefits because generally your gift is deductible from taxable income at “market value” on the date of transfer. (IRS rules apply, and you should always consult with your tax advisor.)

The AEG Foundation website has more information on Planned Giving and the types of bequests that can be made.

## Communication is the Key



Planned giving works best with two-way communication from the start. The AEG Foundation is prepared to appoint an officer to work with you confidentially to develop mutual understanding of your charitable intent and the Foundation’s ability to carry out your wishes.

*Advancing Science, Scholarship and Education in Environmental and Engineering Geology for the Benefit of All*

[www.aegfoundation.org](http://www.aegfoundation.org)