



The Association for Preservation Technology International  
*L'Association internationale pour la préservation et ses techniques*

## APT Planned Giving: The Legacy Circle

Dear APT Community,

My name is Jeff Greene. I've been active with APT for over 35 years. I feel very fortunate to be part of this extraordinary community for preserving our built cultural heritage. I would like to give back something to APT, which has enriched my professional life through its nurturing of many personal friendships and professional colleagues. I want to assure that APT stays vibrant and vital long into the future. I know many others involved with APT feel the same way. Some have already shared their interest with me and have included their names with mine at the bottom of this letter. I ask that you read on and consider joining us in our gratitude to APT. And we are not alone. Over the years several APT members have committed future financial support to APT.

Towards that aim, I'd like to tell you of an initiative that highlights ways for you to help us ensure that the legacy of APT lives on, so future generations of preservationists can flourish and continue contributing to such an important field. It's also an opportunity, unless you wish to remain anonymous, to be recognized for your commitment to APT.

The Legacy Circle is a way that you can promote preservation technology by including APT in your will or estate or giving some accrued assets to APT today. Regardless of where you are in planning your estate, making a bequest is simple with a wide variety of giving options described here. If you have already included APT in your estate plans, let us know so that we can honor your commitment to preservation technology and welcome you into the Legacy Circle. All donations to the Legacy Circle will be placed in APT's endowment where it will generate interest to support APT's operational expenses, following a clear, board-approved policy. Thus, your gift will support APT in perpetuity.

While APT cannot provide tax advice (and we encourage you to speak with your personal tax/financial advisor), most of the options listed offer tax benefits, some of them quite powerful. Those benefits vary by country of residence and giving mechanism, but in many instances, gifts yield a remarkably positive post-tax benefit to the donor.

Each of us listed below has named APT in our estate documents and invite you to join us. We are thankful for what APT has done for us and feel proud to give back in this way.

Sincerely,

A row of five handwritten signatures in black ink, corresponding to the names listed below.

**Jeff Greene**, Founder & Executive Chairman, EverGreene Architectural Arts  
**Gina Crevello**, Principal Consultant, Echem Consultants LLC  
**Michael Tomlan**, Professor, Cornell University  
**Ron Staley**, Senior Vice President, The Christman Company  
**Amy Lamb Woods, PE**, Director of Technical Education at International Masonry Institute

# 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.

- 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 to discuss including APT in my estate plan. Please contact me.
- I would like to make a gift to APT today in the following amount \$ \_\_\_\_\_. Please contact me.
- \$50    \$100    \$250    \$500    \$1000
- \$ \_\_\_\_\_ (other)

First and Last Name: \_\_\_\_\_

Email Address: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

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

Fill out and scan or send a photograph and email to [administration@apti.org](mailto:administration@apti.org)

## APT Successes

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

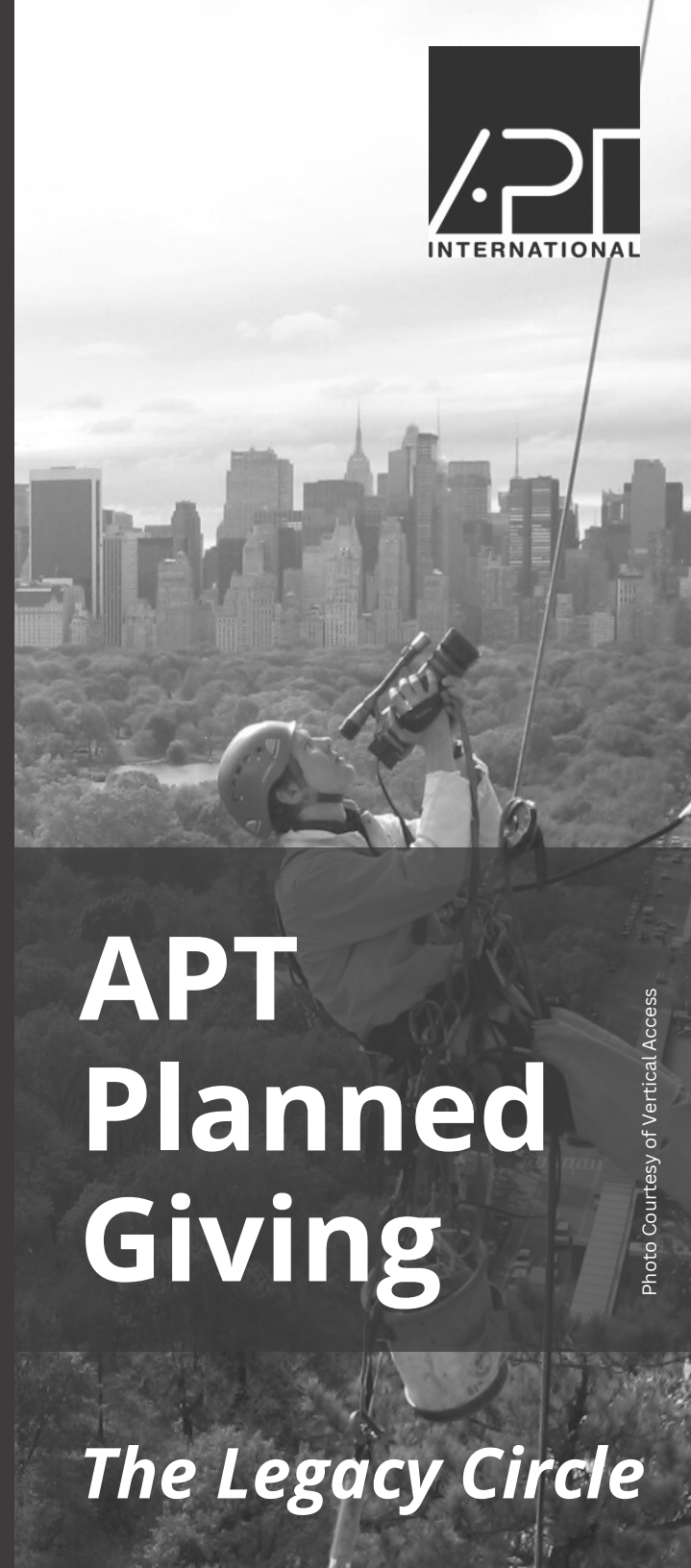
For over 50 years *The APT Bulletin*, our peer-reviewed journal, has been a key, reliable source of information on preservation technology, materials, practice, and the history and evolution of building technology. We've published nearly 1,300 articles – that's 10,700 pages! Through JSTOR Bulletin articles have been read in 174 countries and at over 6,000 universities.

APT's Annual Conference has grown. We now draw attendees from around the globe to participate in hands-on workshops, and nearly 80 paper sessions. Thanks to existing support we subsidize students and scholars from the U.S., Canada, Latin America, the Caribbean, and under-represented communities in North America to attend and grow APT. Two emerging professionals also joined APT's 2022 tour to Italy on full scholarship.

The breadth of APT's activities continues to flourish. With 21 active committees, we have built from foundational elements to 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 a STEAM educational curriculum that uses preservation technology as its core as well as a Disaster Response Initiative. Students and emerging professionals are increasingly active with scholarships, and through our annual Design-Build Competition at the Annual Conference.

Our work continues to grow as do our relationships with preservation organizations around the world. We now have 19 Partner Organizations, and more on the way.

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



# APT Planned Giving

## *The Legacy Circle*

Photo Courtesy of Vertical Access

## 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.

### 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 \$100,000 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 qualify as required minimum distributions for the tax year in which they are made.

**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 estate tax, and you could qualify for a charitable income tax deduction

## Reach Out Today!




Greg Galer, Executive Director  
greg@apti.org



www.apti.org



217-529-9039



Our goal is to build APT's General Endowment, but we would be happy to discuss gifts of endowment scale focused on other current APT activities.

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.

Please reach out above to explore how you can help APT and how you may benefit from a legacy contribution.

Don't worry, we don't expect a commitment on our first contact. 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.

## Giving Options Cntd.

**Real Estate:** The gift of your home is a unique and meaningful way to support APT. You can 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), and at the end of your "life estate" the property will pass to APT. For residences located in the US, you'll receive a charitable income tax deduction for the present value of the remainder interest passing to APT, and you'll 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.

**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.