THE APSA LEGACY SOCIETY
HELPING TO PRESERVE OUR PROFESSION FOR EVERY GENERATION
Estate planning booklet and resource
When you plan your estate, you can make a charitable gift to let your values live on, ensure your heritage at APSA, and contribute to a bright future for political scientists.

Your gift of any size will qualify you for membership in the APSA Legacy Society, which is open to anyone who includes the association in their estate plan with a bequest in a will, or donates a life insurance policy, retirement plan, or other financial account through a beneficiary designation.

With your gift, you will gain the satisfaction of making a difference beyond your lifetime and help us continue support for scholars at the early stages of their careers; offer broad-based resources for research, professional development, and teaching and learning in political science; and promote greater diversity and inclusion in the discipline.

I hope this booklet makes navigating the process of planning your estate and gifts to charitable organizations easier. Please let me know if you have questions or if you already included APSA in your plans so we can celebrate your commitment and support.

Steven Rathgeb Smith
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American Political Science Association
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THE PURPOSE OF A WILL

A will directs how your assets will be distributed after your lifetime. Common purposes of a will include providing for a spouse or children, covering funeral costs, honoring family members and friends, and leaving a legacy through gifts to charity. Writing a will gives you the opportunity to communicate your values to your loved ones and to future generations. By preparing your will now, you can enjoy peace of mind knowing that you have taken care of the people and organizations that are important to you.

LEGAL REQUIREMENTS OF A WILL

It is important that a will meets the legal requirements for the state in which a person resides. Some typical requirements:

• A will must be in writing.

• A person must be mentally competent at the time a will is signed.

• A will must be signed in the presence of two “disinterested” witnesses, that is, individuals who are not receiving gifts in the will.

• Each witness must also sign the will and affirm that the person writing the will signed it and acknowledge it as that person’s last will and testament.

• If a will does not adequately provide for a living spouse, most states have statutes that will allow the spouse to claim one-third to one-half of the estate.
REMEMBER APSA IN YOUR WILL— BEQUEST

A gift in a will, known as a bequest, can be modified at any time up until your death if your circumstances change. You may direct your bequest for a specific purpose at the association, and APSA can work with you and your attorney to identify ways to meet your giving interests.

If you already have a will and want to make a bequest, a codicil can be added, rather than a total rewriting of your will. A member of the APSA development staff can provide you with sample bequest and codicil language for you and your lawyer to consider.

OTHER WAYS YOU CAN GIVE— BENEFICIARY DESIGNATION

You can also make a gift to support APSA by naming the association as a beneficiary of a:

- Life insurance policy
- Retirement account
- Brokerage account
- Certificate of Deposit (CD)
- Donor-advised fund
- Other bank and financial accounts that allow transfer on death (TOD) or payment on death (POD) designations

You can make APSA a beneficiary of 5, 10, 50 or even 100 percent—any amount you choose. You can also review and adjust your beneficiaries at any time, just like a gift in your will.

If you would like to discuss adding the association to a will or beneficiary designation form, please email development@apsanet.org and also consult a legal or financial advisor.

When adding us to your estate giving plan, please include the following information:

Legal Name: American Political Science Association
Tax ID: 53-0200001
Relationship: 501(c)3 not-for-profit organization
Incorporated in: Washington, DC
YOUR INVITATION TO
THE APSA LEGACY SOCIETY

The APSA Legacy Society and giving program was founded to honor donors who have made a future gift in their estate plan to help continue our work for the next generation of political scientists.

JOINING IS SIMPLE

We invite you to join this special group of forward-thinking donors. It is as simple as notifying us of your gift intentions. Please contact us and we will assist you on a confidential basis. You are under no obligation and your gift may remain anonymous if you choose.

Members are recognized each year unless requesting anonymity, and we also tell your story on our website, honoring your generosity to the study of political science and to APSA.
The information provided in this booklet is presented solely as educational information and is not intended as legal or financial advice. It is recommended that you speak to an estate planning attorney when you decide to write your will or trust. You should also speak to an attorney if you wish to amend your will. Finally, if you move to another state, you should always check with an attorney in your new state of residence to ensure that your will is still valid because requirements frequently vary from state to state.

Consider adding your legacy support to those of others who, like you, want to have a crucial role in ensuring a bright future for scholars, teachers, students, and practitioners.

**BENEFITS FOR YOU**

Through the APSA Legacy Society, you can:

- Make a gift of any size.
- Ensure your donation is directed according to your wishes in the future.
- Retain control of your assets during your lifetime.
- Donate in honor or memory of someone special.
- Designate your gift to the APSA program or fund important to you.

**FINAL THOUGHTS**

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The American Political Science Association (APSA) is the world’s leading professional organization for the study of political science. Since its 1903 founding, APSA has brought together scholars from all fields of inquiry, regions, and occupational endeavors within and outside academe to deepen our understanding of politics, democracy, and citizenship.