The APS Legacy Circle is a giving society for generous individuals who have included us in their estate plans. Planned gifts take various forms including APS being the beneficiary of retirement funds; receiving a portion of life insurance proceeds; benefiting from gifts that provide perpetual income or being named in a will.

As a donor, you reserve the right to choose whether your support benefits a specific APS program or campaign, or whether it is earmarked for the unrestricted endowment. Unrestricted endowment funds are designated by the APS Board of Directors to areas where the need for support is greatest. In all cases, these gifts are carefully and professionally managed by APS and its external investment advisors.

What is the Legacy Circle?

There are many ways to help further the APS mission, and we want to help you plan a gift that fits your goals. Our new website puts the gift planning resources you need at your fingertips.

plannedgiving.aps.org

Please note that APS is a 501(c)(3) organization, therefore your gift is tax-deductible to the extent provided by law. If you have already made the important decision to include APS in your will, please let us know so that we can acknowledge your commitment.
APS Legacy Circle Profile: Erol Oktay

Plasma physicist Erol Oktay knows the importance of collaboration. Now retired, Oktay was for many years involved in one of the world’s most complex and collaborative endeavors—the International Thermonuclear Experimental Reactor (ITER) being built in France to prove the feasibility of fusion as a large-scale and carbon-free source of energy based on the same principle that powers our Sun and stars. And as a member of the APS Legacy Circle, he values the way physicists can come together to support their professional society through the APS planned giving programs.

“I’ve been a member of APS for over 50 years,” says Oktay. “I decided I should go ahead and support the field of plasma physics and fusion. I started talking to people in the community and decided that the best way would be through APS and the Division of Plasma Physics.”

Oktay received his PhD degree from the University of Michigan in 1969 with a thesis on how lasers interact with laboratory plasmas. After five years of research at Massachusetts Institute of Technology and the University of Maryland, he joined the US Department of Energy (which was then called the Atomic Energy Commission) and worked in the Controlled Thermonuclear Fusion Division until his retirement in 2011.

“My activities in this group involved program management with responsibilities of oversight for fusion programs at Los Alamos National Laboratory, the Princeton Plasma Physics Lab, Oak Ridge National Lab, and General Atomics in San Diego,” he explains. “In addition, I was involved with the International Energy Agency (IEA) and bilateral collaborations with all major fusion labs in the European Union (France, Germany, Belgium, and Italy), and in UK, South Korea, Japan, Russia, China, and India. My position for the last five years of my government career was Acting Director, ITER and International Division in the Office of Fusion Science.”

In early 2020, Oktay and his wife, Prof. Julianne Oktay, established with APS the “International Fusion Research on Burning Plasma Physics Fund,” which supports students and early career scientists at US universities to take part in international workshops and research activities. They have made a multi-year gift to support this effort and made a legacy gift to further this important work for years to come.

The Oktays are members of the APS Legacy Circle, which recognizes donors who support the APS mission through this kind of planned giving. By including APS in their estate plans, the members create an enduring legacy that will benefit researchers, educators, students, and the general public.

Oktay would like to see more people involved in the Legacy Circle. “We also contribute to the Baltimore Symphony Orchestra, and they have a Legacy Circle that is quite big,” he says. “I think that the physics community should be more aware of the APS Legacy Circle and that there are quite a lot of people who can make this kind of contribution.”

An Enduring Power of Estate Gifts: Increasing Minority Representation in Physics

APS is committed to the inclusion of underrepresented minorities in physics and has spent decades working on programs to increase recruitment and retention of African American, Hispanic American, and Indigenous physicists at all levels of academic and professional achievement.

One of the many initiatives that your estate gift could support is the APS Inclusion, Diversity, and Equity Alliance (APS-IDEA). APS-IDEA is a long-term initiative with a mission of empowering and supporting physics departments, laboratories, and other organizations to identify and enact strategies for improving equity, diversity, and inclusion. It will do so by establishing a community of transformation.

APS-IDEA supports teams of students, staff, and faculty in physics departments and laboratories to advance equity, diversity, and inclusion (EDI) in their places of work and study. Over the last several years, the physics community has been directing increased attention to EDI within the profession. However, many physicists are working in isolation, lack knowledge about EDI, run into barriers trying to change the culture, and/or experience burnout. The APS-IDEA initiative offers transformational support to departments and institutions as they develop and implement change strategies based in social science, develop and execute effective EDI plans, and connect groups to a broader community engaged in this work.

There are already 99 teams in the network and your gift could play a role in expanding this important initiative.
I’m part of two marginalized groups. I am a woman and I am Black and it is because of initiatives like APS-IDEA that I see change happening across academia. I am a living testament that these programs help increase representation in physics for marginalized groups, helping students like me find their path to pursue the field of physics, a path that is often less travelled and less funded.”

Michelle Lollie
Louisiana State University physics graduate student

Family or Charity? The Answer is Both!

Naming the American Physical Society as a beneficiary in your will is a simple way to support the Society and its programs in perpetuity. But maybe you have hesitated because you are unsure about how much to give.

Because life is unpredictable and the value of your assets is likely to fluctuate, you don’t want to risk that someday your charitable gift could compromise the well-being of your family. Fortunately, there are many solutions.

STRATEGIC LEGACY GIVING

Instead of giving a fixed amount, a legacy donor may consider gifting a percentage of your estate or a specific asset(s). That way, gifts to loved ones and to organizations such as APS remain proportional—no matter how your estate fluctuates.

Here are three simple ways to put your loved ones first while supporting APS and the continued growth of the physics community:

1. Gift a percentage of your estate to the American Physical Society in your will; or
2. Leave APS a percentage of your residual estate (the portion of your estate that remains after all gifts have been made and all other claims of the estate are satisfied) or a specific asset or investment; or
3. Name APS as a beneficiary of a percentage of your life insurance policy or retirement account.

To create your legacy of charitable giving while ensuring your gift remains in relative proportion to benefiting family members, ask your estate planning attorney to include language in your will or living trust.

How To Say It:
“I give ___% of my estate to the American Physical Society based in College Park, Maryland, for its general support of the Unrestricted Endowment Fund (or the program of your choosing).”
HAVE A QUESTION?
WE CAN HELP.
Contact us to learn more about easy ways to leave a lasting legacy.

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