In Recognition

The Legacy Circle is composed of generous and forward-thinking donors who have made the important decision to support APS’s long-term success through a planned gift. As 2021 comes to a close, we want to recognize those who have made this important commitment to provide for long-term viability for APS.

Anonymous (1)  
Charlotte Marie Anderson  
Jean Dickey Apker  
Robert Bachrach  
Esther Hoffman Beller  
M. Hildred Blewett  
Bert Brown  
Mary and Rudolph Chope  
C. Stewart Gillmor  
Theodore W. Hodapp  
Jay Jones  
Kevin Kase and Mori Wilner  
Ken and Paula Krane  
Beatrice Lilienfeld  
Suha Oguz and Leslie J. Lord  
Erol and Julianne S. Oktay  
John J. Rehr  
Robert Stanek  
Aleksandar Svager  
David Sward  
George O. Zimmerman and  
Isa Kaftal Zimmerman

If you have included APS in your estate plans or would like to speak with the Director of Development about your legacy, please contact Kevin Kase, at kase@aps.org or 301-209-3224.

We look forward to having these important conversations with you about your legacy giving plans and including you in securing the future of APS.
Your Gift Can Help Expand the National Mentoring Community

Making a designated gift is one important way your planned gift to APS can help support programs in the future. For example, you could designate your gift to expand the APS National Mentoring Community (NMC). This program facilitates and supports mentoring relationships between African American, Hispanic American, and Indigenous undergraduate physics students and local physics mentors. By designating your planned gift to NMC, membership in it can remain free for both Mentors and Mentees.

The vision of NMC is for every student from a marginalized ethnic or racial group who is interested in physics to have access to qualified and trained mentors, opportunities, connections, professional development, peer support, and resources.

“When I looked around and I didn’t see any other women or people of color in theoretical physics, I started to think that it was maybe because we didn’t belong there. My mentor, through the NMC, told me that I did belong there and that my time was coming,” Mentee Madelyn Leembruggen

Today, there are more than 200 mentoring relationships established with the goal of sustaining these relationships and achieving many more connections to grow a more diverse physics community.

APS Legacy Circle Profile: Robert Stanek

As a high energy physicist, Robert Stanek has worked on some of the biggest experiments in physics, including HERA, Germany’s largest research instrument, and as part of the ATLAS collaboration at CERN. To ensure students from low-income backgrounds or underrepresented groups have the opportunity to study physics, Stanek also joined the APS Legacy Circle, which recognizes donors who support APS initiatives through planned giving. APS members who join the Legacy Circle help to fund initiatives that will make a positive impact on the physics community.

“I’ve always been a proponent of helping students out,” says Stanek. “I was going to leave all [of my money] to help scholarships for students [hoping to] go into physics. And then my wife convinced me to leave half to Lincoln Park Zoo [in Chicago] and half to APS. My motivation was to give scholarships to students that could not afford [college] that wanted to go into physics.”

Stanek received his PhD in 1980 from the University of Illinois at Chicago, completing his thesis work at Fermilab. After a brief stint working in nuclear medicine at the Edward Hines, Jr. VA Hospital, Stanek returned to high energy physics as a postdoc at Argonne National Laboratory. Stanek would go on to work on polarized beams at Fermilab, Los Alamos National Laboratory, and HERA, before ending up at CERN, where he served as a project leader on ATLAS for four years.

Stanek is now connecting with the next generation of physicists through volunteer activities to help get kids interested in science. Before the coronavirus pandemic, Stanek spent his Saturdays volunteering at Chicago’s Museum of Science and Industry performing physics demos. He also takes demos to local schools to “show kids that physics can actually be fun.”

Inspired by his predominantly Hispanic community in the Southwest side of Chicago, Stanek became interested in helping students pursue college who may not otherwise be able to afford it. He has donated to the APS Bridge Program, which is working to increase the number of PhDs awarded to students from backgrounds that haven’t been traditionally represented in physics.

Stanek encourages others to consider the impact of investing in physics on the future generation. “I would suggest thinking about supporting students to go into physics…these young kids that are coming up, are they going to have [to] make it on their own, or are you going to help them out if you can?” says Stanek. “It’s my priority to get kids into high energy physics…but if somebody else wants to do solid-state physics, then that’s fine with me, too.”
Planning Now to Give Later

This is the time of the year that most people think about giving and receiving. We know that your decision to support APS comes from your love of physics. You need not be wealthy to leave a legacy. Ensure the sustainability of our organization in a way that makes your core values known to others. Generations to come will benefit from your gift to the future of physics. And, your support of our mission will be long remembered and serve as an inspiration to others. An added bonus is that your gift may also qualify for a tax benefit this year when you itemize deductions on your federal income tax return.

By making a donation today, you can help APS expand its mission and goals. It’s easy to do. And you don’t have to be a billionaire to do it. While cash contributions are always appreciated, there are other creative and flexible giving options that can benefit you and the American Physical Society. Consider, for example, donating appreciated real estate, stocks, marketable securities, or other assets. Many planned giving options offer generous tax benefits as well. Whether it is naming APS as the beneficiary of a life insurance policy or other liquid or non-liquid assets, we encourage you to consult with your financial advisor to discuss the options.

Here are some assets you may not have considered and the impact they can have on your taxes when you use them charitably.

**IRA DISTRIBUTION**

- If you are 59½ or older, you can take a distribution from your IRA and then make a gift to APS without penalty. If you itemize your deductions, you can take a charitable deduction for the amount.
- If you are 70½ or older, you can give any amount up to $100,000 per year from your IRA directly to APS. You will not pay income taxes on the transfer. If you are 72 or older, you can use this transfer to satisfy your required minimum distribution.

**To do:** We must receive your gift by Dec. 31 for your donation to qualify this year. If you have check-writing features on your IRA, please be aware that your check must clear your account by Dec. 31 to count toward your required minimum distribution for the calendar year.

**APPRECIATED STOCK**

You may enjoy two tax benefits with a gift of appreciated stock: Avoid paying taxes on the appreciated value and qualify for an income tax charitable deduction based on today’s market value, when you itemize.

**To do:** Complete all transfers by Dec. 31.

**DONOR-ADVISED FUND**

Contribute to a donor-advised fund and enjoy tax savings on that amount when you itemize.

**To do:** Complete the contribution by Dec. 31. You do not have to designate the funds this calendar year to receive the tax benefits.

**GOOD END-OF-YEAR PLANNING**

And, here is a list of other “best practice” year-end planning items we encourage you to review and end the year on an organized note.

- **Update your will or living trust.** Review your will or trust for any life change such as a birth, death, marriage, or a move to a different state.
- **Review your retirement plan beneficiaries.** Remove any beneficiary on your life insurance or retirement plans who is deceased or is a former spouse, and consider adding APS.
- **Review your life insurance policy.** If you have a policy that is no longer a significant piece of your estate plan, consider making a gift by assigning ownership to APS or making us the beneficiary.
- **Durable power of attorney.** Make sure your durable powers of attorney for financial matters and health care are current. A copy of the financial power of attorney should be given to your appointed agent, while a copy of your health care power of attorney should be provided to both your agent and health care providers.
- **Safe-deposit box.** Catalog the contents of your safe-deposit box. Give a written copy to a trusted family member and note any items you are holding for someone else.
- **Bank or brokerage accounts.** Name designated heirs or APS as a recipient of bank or brokerage account proceeds after your lifetime.*
- **Charitable contributions.** If you’ve included a gift to APS in your estate plan, review the details of your gift and let us and your loved ones know of your intentions. This will guarantee that your wishes are carried out after your lifetime.

*State laws govern payable on death accounts and transfer on death accounts. Please consult with your bank representative or investment advisor if you are considering these gifts.*
HAVE A QUESTION?
Contact us to learn more about easy ways to
leave a lasting legacy.
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Director of Development
(301) 209-3224
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The information in this publication is not intended as legal or tax advice. For such advice, please consult in advance an attorney or tax advisor. Figures cited in any examples are for illustrative purposes only and are subject to change. State law may further impact your individual results.

Go to plannedgiving.aps.org
WANT MORE INFORMATION ABOUT PLANNED GIVING TO SUPPORT APS?