



WAYS TO GIVE

3-in-3 Capital Campaign 2019

Over the next **3 YEARS** the Academy is aiming to raise **\$3 MILLION** and we ask for **YOUR HELP**.

There is no one way to contribute to this important effort to support American diplomacy. Below are some details on how you can help us meet our goal by giving cash, donating appreciated securities, making a distribution from your retirement account, or leaving a bequest. In addition to these efforts, we also provided some suggestions below on how to encourage others to support the Academy.

**THANK YOU IN ADVANCE FOR
YOUR SUPPORT!**

*Your support will
ENABLE the
Academy to do more
to **STRENGTHEN**
American diplomacy
and **EXPLAIN**
its importance to
Americans.*

American Academy of Diplomacy
Tax ID Number (EIN)

52-1341314

CASH

The simplest way to give to the Academy is a cash donation. It is simple, may be deductible, and can be made through several different payment methods:

Check

Please make your check payable to "American Academy of Diplomacy" and mail it to:
American Academy of Diplomacy
1200 18th Street, NW, Suite 902
Washington, DC 20036

Credit Card

You may give using your credit card by going to the Donations page of the Academy's website:
<https://www.academyofdiplomacy.org/dues/>.

Wire Transfer

You may also wire your gift to the Academy directly from your bank account. Please email mreissaus@academyofdiplomacy.org for details required to set up the transfer.

Disclaimer: American Academy of Diplomacy does not provide tax, legal or accounting advice. This material has been prepared for informational purposes only, and is not intended to provide, and should not be relied on for, tax, legal or accounting advice. You should consult your own tax, legal and accounting advisors before engaging in any transaction. Financial and other information about the Academy's purpose, programs and activities can be obtained by contacting the Academy by email (academy@academyofdiplomacy.org) or phone (202-331-3721).



APPRECIATED SECURITIES

Another way to make your gift to the Academy is by donating appreciated securities (e.g., stock, bonds and mutual funds). With a gift of appreciated securities held for more than one year, you may be entitled to one or both of the following benefits – a tax deduction for the full fair market value of your securities, and/or no tax on any potential capital gain.

The easiest way to give securities is by means of an electronic transfer following two steps below:

1. Send instructions to the custodian of your securities to make the donation of a specific number of your shares in a specific company to the following Academy account at our custodian, Global Institutional Consulting at Bank of America Merrill Lynch. A template letter is provided in a separately attached document, but please check with your securities custodian first as they might have a different way of initiating the process (e.g., sending an email or filling out a form). Please make sure to include the following information in your instructions:

Bank of America Merrill Lynch

DTC Number: 8862

Global Institutional Consulting

For Credit to Account: 5TL02986

Account Name: American Academy of Diplomacy

2. Alert the Academy of your transfer by emailing the following transfer details to mreissaus@academyofdiplomacy.org:

Name and address of the donor

Name and ticker symbol of the security

Number of shares

Upon receipt of your gift, the Academy will follow up with a Thank You acknowledgement including the exact value of your gift. Please consult with



your accountant or financial advisor before donating. If you would prefer to give a gift of a physical certificate instead of an electronic transfer, please contact the Academy at mreissaus@academyofdiplomacy.org for additional instructions.

DISTRIBUTION FROM A RETIREMENT ACCOUNT

If you are required to take distributions from a retirement account (IRA, annuity), you may be entitled to make a charitable distribution of up to \$100,000 directly from such an account to the Academy. There may be several benefits of doing this. If made directly from the IRA to the Academy, the distribution may be excluded from taxable income. This type of distribution may qualify as a required minimum distribution. Check with your accountant and IRA administrator about the specific steps you need to take to initiate such a distribution, because the procedures can vary.

BEQUESTS

If you have or are preparing a will or a trust, please consider a charitable bequest to the Academy. Here are a few potential benefits of charitable bequests to consider, although you should speak with your financial advisor before making any changes to your will or trust:

- **Flexibility:** Charitable bequests are flexible and easy to update. You may write one into a will with a short paragraph, and if circumstances change you may revoke it in a subsequent will or codicil. Estate planning professionals often counsel their clients to have an annual or bi-annual estate plan “check-up” to ensure that the most recent version of the client’s will reflects their wishes. Alternatively, instructions for a legacy may be given directly to an annuity rather than put in a will. You may name the American Academy of Diplomacy as a beneficiary on an annuity by calling the annuity company and completing a beneficiary document.



- **Tax benefits:** An estate may be able to deduct charitable bequests of not only cash, but also property such as real estate, stock, IRAs, autos and other assets. Not all assets are treated equally if inherited by heirs—for example, retirement assets are typically less advantageous to leave to heirs than appreciated securities—so there may be benefits to carefully selecting which assets to use as a part of a charitable bequest to maximize the benefits to all involved.
- **Recognition:** A bequest gift may be a way to achieve an additional recognition and a lasting legacy at the Academy.
- **Efficiency:** Charitable bequests may help the efficiency of settling an estate because the bequests provide clear instructions to the executor on how to distribute certain assets in accordance with the testator's wishes.

ENCOURAGE OTHERS TO SUPPORT THE ACADEMY

Many companies, organizations and institutions have matching gift and philanthropy initiatives to reward their employees' charitable donations. If an organization or an institution with which you are affiliated has such a program, please consider leveraging it to amplify the impact of your gift.

Also, please consider encouraging your friends, relatives, or colleagues with an interest in diplomacy to support the Academy's Capital Campaign.