

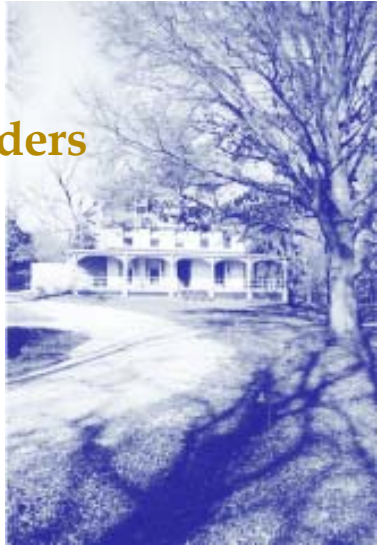
Honoring her legacy  
Preserving her home  
Developing future leaders



**An Invitation to join the  
*Alice Paul Legacy Society*  
and help support  
the Alice Paul Institute  
through planned giving**

# Honoring her legacy Preserving her home Developing future leaders

**F**or more than twenty years, the Alice Paul Institute (API) has served as a major resource for young women's leadership development, women's history and historic preservation. API purchased Alice Paul's birthplace, *Paulsdale*, to commemorate Alice Paul's accomplishments on behalf of women and to create a powerful symbol of her place in history. Today, *Paulsdale* serves as the headquarters of the Alice Paul Institute and its programs, reaching over 20,000 young women, students, seniors, community groups, and educators.



Thanks to dedicated support from its funders, members and donors, API has been able to expand the organization's services as well as restore and preserve *Paulsdale* for future generations. The creation of the *Alice Paul Legacy Society* will ensure that API continues to serve the leadership development needs of young women, expand educational opportunities focusing on women's history, and preserve *Paulsdale* as a tool for understanding our past. By making a planned gift, you can become a member of the ***Alice Paul Legacy Society***, a group created specifically for those intending to support API beyond their lifetimes. In the process, you will earn guaranteed life-long income and create generous tax breaks for yourself and for your loved ones.

This booklet outlines a number of options that will allow you to extend your history of caring about API through membership in the *Alice Paul Legacy Society*. Funds received from members of the *Alice Paul Legacy Society* will become part of API's recently established endowment at The Philadelphia Foundation. This endowment creates a long term financial resource for the Alice Paul Institute, enabling API to continue its work in developing "future Alice Pauls" in years to come.



**ALICE PAUL**  
**INSTITUTE**

# What is

## “Planned Giving”?

**P**lanned giving offers a way to provide guaranteed income for life for you and for your loved ones while investing in the Alice Paul Institute. Planned giving allows you to donate to a charity during your lifetime and/or after your death, while meeting your current income needs and providing for your heirs. Planned giving is typically done in conjunction with estate planning and is a viable option for caring people of all income levels.

A planned gift expands your horizon beyond *charitable* donations (that meet today's operational needs) into larger *philanthropic* contributions that assure long-term stability to meet future needs. Planned gifts offer many personal, financial and tax benefits to you and your family, while creating larger gifts for the Alice Paul Institute. So, in addition to the psychological reward of being a partner in our work today and tomorrow, you'll also have the gratification of leaving a gift that will live on forever. Planned gifts can also identify family members as income beneficiaries – to help your loved ones as well as our programs. You may also offer your gift in the form of a challenge.



# Opportunities from Planned Giving

**A**n extensive array of planned giving vehicles enable you to leave a legacy and support the cause that matters to you. You and your heirs can combine savings in income taxes, capital gains taxes, gift taxes, estate taxes, and probate costs with the knowledge that you are providing a significant gift to the Alice Paul Institute that will be used exactly as you intend... forever.

Planned giving offers many benefits including:

- protection for your beneficiaries through professional management
- avoidance of the burden of asset management
- the personal satisfaction of providing long-term support for API

We encourage you to consult with your financial or legal advisors to fully explore the legal, financial, tax and personal implications of these options.



# Bequests

*...your heirs realize significant estate tax savings*

**T**his planned gift is as simple as adding a provision in your will naming the Alice Paul Institute to receive either a stated dollar amount, a specific item of property, a percentage of your estate, or a portion or all of the remainder.

Bequests are the most common planned gifts. They enable you to retain complete control over your assets during your life, while your heirs realize significant estate tax savings for amounts transferred at death. You may change the terms of your bequest as necessary, and keep all transactions private until your death.

**Suitability: Anyone with charitable intent.**



# Life Insurance

*... leverage your gift*

If you took out an insurance policy years ago to pay off expenses you no longer worry about, such as your mortgage or your children's education, a simple way to make a significant contribution is to name the Alice Paul Institute as a beneficiary of an existing policy — or give a fully paid policy to API. You may also donate the cash value of the policy.

You'll enjoy the leverage of making a major gift at a fraction of the face value of a policy. You can provide the Alice Paul Institute with substantial support using "found" money, while taking advantage of considerable income and estate tax deductions. You may use this gift to complete a pledge or to make a major gift without having to expend additional dollars.

**Suitability: Anyone wishing to see that  
one person can make a difference!**



# Charitable Gift Annuity

*... receive fixed annual payments  
for life*

**W**ith a charitable gift annuity, you make a tax-deductible gift of cash or appreciated securities. You may name up to two income beneficiaries, including yourself, to receive fixed annual payments for life. Despite today's volatile economic climate, the interest income is not only stable and predictable, but interest rates are very attractive.

Because a portion of your gift annuity will be used for charitable purposes, you are entitled to an income tax deduction in the year your gift was made. In addition, a portion of each annuity payment may be free of income tax or taxed at capital gains rates that are lower than tax rates on other income. Upon your death, the remainder will go to the Alice Paul Institute Endowment Fund at The Philadelphia Foundation.

Charitable gift annuities provide a high income coupled with tax advantages. They are a wonderful way to make a meaningful gift while enjoying income and tax benefits that help enhance your financial well-being.

**Suitability: Any individual age 60+ of any estate size seeking the security of a fixed income for life for themselves or other beneficiaries, using a gift arrangement that is easy to understand.**



# Charitable Remainder Trust (CRT)

*... receive guaranteed income for life*

**A** charitable remainder trust (CRT) enables you to receive interest income for a certain period of time, after which the Alice Paul Institute will receive the remaining trust principal. You irrevocably transfer cash, equities, or real or personal property to the trust. You then receive interest income for life or a certain period of time (no more than 20 years). Your income may be a fixed amount (*Annuity Trust*) based on the value of the assets at the time the trust is created, or a fluctuating amount (*Unitrust*) based on a fixed percentage of the trust's annual value.

Upon the death of the named income beneficiaries or at the end of a specified number of years, the Alice Paul Institute School Endowment Fund will receive the remaining trust principal.

CRTs may: eliminate or reduce your taxable income, capital gains and estate taxes. CRTs may also improve lifetime cash flow; increase income from low-yielding assets; and create a source of income for children, parents and other loved ones.

**Suitability: Annuity trust:** persons who want the security of a known return with fixed payments.

**Unitrust:** Individuals who prefer the flexibility of a return with variable payments.



# Charitable Lead Trust (CLT)

*... ensure a larger inheritance  
for your heirs*

**I**n a charitable lead trust (CLT), a trust is created that provides the Alice Paul Institute Endowment Fund with income interest for a certain period of time, such as 5, 10, 15 or 20 years. At the end of this period, or upon your death, the remainder is paid to you or to other beneficiaries you have named.

A CLT enables you to make a significant gift to API while helping to ensure future economic security for you and your loved ones. A CLT also provides your heirs with a larger inheritance than would otherwise be possible.

This plan is especially attractive for people who are subject to federal gift or estate taxes, or who need to transfer specific assets (such as stock in a family-owned business or income-producing real estate) to heirs.

**Suitability:** High net worth individuals who have a sincere charitable interest and who are concerned about saving gift and estate taxes for the entire family.



# Pooled Income Fund

*... a mutual fund with a charitable deduction*

**M**uch like a mutual fund, a pooled income fund offers you a variable amount of income each year, plus the tax benefits of a charitable deduction.

You transfer cash or property irrevocably to the pooled income fund which is administered by The Philadelphia Foundation. Interest income, a proportionate share of the fund's interest and dividend income, is paid annually to you or to named beneficiaries, for life. Upon your death, the remainder is distributed by the pooled income fund to the Alice Paul Institute Endowment Fund for charitable purposes.

You get an immediate income tax deduction for your gift. If transferred securities have appreciated in value you pay no capital gains tax on the appreciation. Your interest in the fund is not taxed as part of your estate when you die.

**Suitability: Individuals 60 and over with smaller estates.**



# Management

## *... administration of your planned gift*

**T**he Alice Paul institute has entered into a partnership with The Philadelphia Foundation to provide administrative support for planned gifts earmarked for API's Endowment Fund.

Established in 1918, The Philadelphia Foundation is a \$325 million pool of more than 750 charitable trust funds created to benefit our local region. The Foundation is a public charity, a community foundation that is the leading provider of philanthropic services in Bucks, Chester, Delaware, Montgomery and Philadelphia Counties.

The Philadelphia Foundation helps local residents manage their charitable giving more effectively by establishing philanthropic vehicles, investing these assets wisely, and awarding the distributions as grants and scholarships to community organizations exactly as the donors intended. In 2006, the Foundation awarded \$18 million to 1,000 community nonprofit organizations.

Your planned gifts will be overseen by the Foundation's Board of Managers, an all-volunteer board of civic leaders which approves the Foundation's investment policy and spending policy and which has final authority over all grants awarded. The Board's Investment Committee recommends all modifications to the investment policy, sets investment performance benchmarks and asset allocation parameters, and monitors the practices and performance of asset managers.

The Foundation has its own investment vehicle and works with leading banks in the region that also serve as trustees of the Foundation's investments. The general asset allocation policy is to diversify investments to provide a balance that will enhance total return while avoiding undue risk concentration in any single asset class or investment category. The Foundation has been achieving a very respectable total return for donors in recent years; returns over time continue to be strong. The growth of fund value ensures The Philadelphia Foundation's future ability to fulfill your philanthropic wishes.

# Celebrating API's History



For over twenty years, the Alice Paul Institute has been educating the public about the life and work of Alice Stokes Paul (1885-1977), author of the Equal Rights Amendment and a lifelong activist for women's equality. *Paulsdale*, her birthplace and National Historic Landmark, is a center for celebrating women's leadership and history. With over 400 individual and organizational members, API has grown from an all-volunteer organization to one with three full-time staff, a 14-member Board, and a growing and dedicated volunteer base. API's accomplishments include:

- Purchasing, in 1987, the only known books, papers, and memorabilia of Alice Paul. This collection was donated to The Arthur & Elizabeth Schlesinger Library on the History of Women in America at Radcliffe College and the Smithsonian Institution's National Museum of American History.
- Creating the Alice Paul Archives, a collection of books, pamphlets, manuscripts, photographs, and other artifacts for the benefit of researchers.
- Purchasing and preserving *Paulsdale*, a \$1.2 million project that restored the property to Alice Paul's period of significance (1885-1920) and achieved National Historic Landmark status and inclusion on the New Jersey and National Registers of Historic Places.
- Serving as Project Director for the *New Jersey Women's Heritage Trail*, resulting in a survey and publication of women's historic sites statewide.
- Recognition from The President's Commission on the Celebration of Women in American History for "visionary leadership in bringing women into the mainstream of American history."
- Expanding the *Alice Paul Leadership Program* and API's *Heritage Programs* to record numbers of students, educators and leaders.
- Receiving the Mount Laurel Board of Education's official endorsement of API's *Meeting Alice* workshop for all fourth grade public school classes.

# About the Alice Paul Institute's Programs and Services

The Alice Paul Institute provides women and girls with tools to reach their full potential and to recognize the critical strength they can draw from gender solidarity. Our flagship program, the *Alice Paul Leadership Program*, provides leadership training grounded in an understanding of women's accomplishments and the ability of women to overcome obstacles. Components include:

- **Girlblazers:** a 10-day summer camp for adolescent girls.
- **Lead-A-Way:** a 10-week series of workshops, focusing on women leaders.
- **Leadership: Share Your Voice:** a one-day workshop which introduces girls to successful women leaders and the skills to become leaders of the future.
- **Looking at Careers: Where Do I Go from Here?:** an after-school workshop with a panel of women leaders offering mentoring.
- **Girls' Advisory Council:** teen volunteers who support API events, evaluate programs, represent API at meetings, and plan women's history events for the community.
- **G.O.L.D. (Girls Overnight Leadership Development):** an overnight at *Paulsdale* to explore Alice Paul's life and home and to focus on teamwork.
- **Next Steps: Girls & the College Adventure:** connects high school girls with college women to learn about the college search and application process.
- **Celebrate New Jersey Women:** a festival at *Paulsdale* that explores the achievements of New Jersey women.

API's Heritage Programs include:

- **Informational Services:** a clearinghouse for inquiries about Alice Paul, the women's rights movement, and Mount Laurel history.
- **New Jersey Women's History Website:** an on-line resource for teachers, students, the media and the general public.
- **Alice Paul: New Jersey's Heroine for Equality:** lectures on women's history and the life and work of Alice Paul.
- **Special Programs and Events:** public lectures, performances, workshops and study groups that highlight women's history.
- **Tours of Paulsdale:** for school groups and other organizations.
- **Meeting Alice:** a two-hour field trip program at *Paulsdale* for elementary school students.

# Mission Statement



**O**ur mission is to continue Alice Paul's legacy by:

- Educating the public about her life
- Preserving historic *Paulsdale*
- Developing future leaders and
- Achieving women's equality

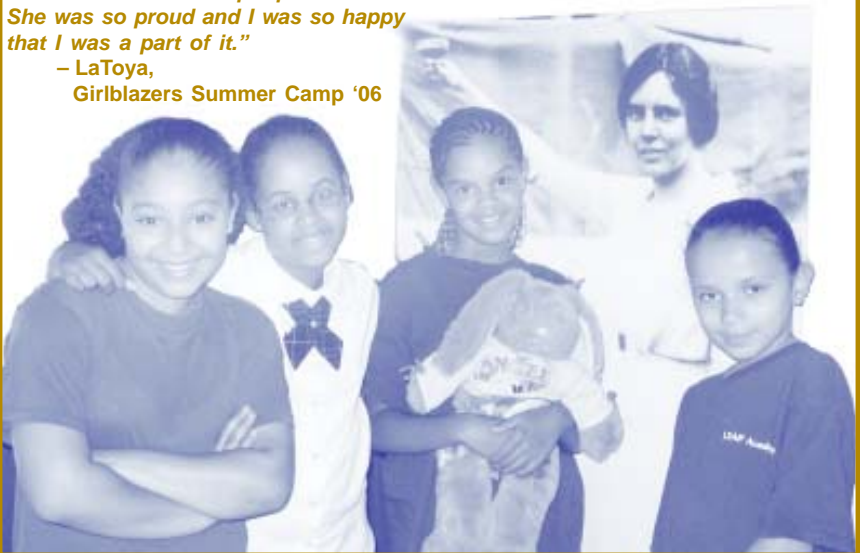
The motto of the Alice Paul Institute is:

***"One person can make a difference"***

Now is the time to continue this legacy for our children and grandchildren. If not us, who? If not now, when?

***"When I went home, I told my mom what we worked on and what people like Alice Paul did. She was so proud and I was so happy that I was a part of it."***

***– LaToya,  
Girlblazers Summer Camp '06***





**“Equality of rights under the law shall not be denied or abridged by the United States or by any state on account of sex.”**

**– *Equal Rights Amendment, Alice Stokes Paul, 1923***

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# Join the *Alice Paul* *Legacy Society* Today!



**T**he Alice Paul Institute has played a vital role in the leadership development of young women and the educational needs of students, educators and the general public since 1985. To continue to ensure that these needs will be met in the 21<sup>st</sup> century, we ask that you support the organization through planned giving by joining the *Alice Paul Legacy Society* today.

**Please be a partner in our mission to develop future women leaders, and to spread the word that one person can indeed make a difference.**

YES, I am considering a planned gift that will support the **Alice Paul Institute**. I am particularly interested in (check all that apply):

- Bequest                       Charitable Gift Annuity                       Charitable Lead Trust  
 Life Insurance                       Charitable Remainder Trust                       Pooled Income Fund

Please contact me, in strictest confidence, with particulars:

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Name

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Address

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City, State, ZIP

---

Daytime telephone

e-mail

Please detach this page and mail or fax it to

**Jodi Rosen,**  
**Development Officer**  
**The Philadelphia Foundation**  
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*The official registration and financial information of The Philadelphia Foundation may be obtained from the Pennsylvania Department of State by calling toll-free, within Pennsylvania, 1-800-732-0999. Registration does not imply endorsement.*