

Early Career Liaison to the Executive Committee 2025-2026 Annual Report

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The primary objective of this 12-month role for the Early Career Liaison was to develop a planned giving program that provides donors with guidance on how to include the AABA in their estate planning. Initiatives like the planned giving program offer members an additional option to financially support the AABA and its mission for decades to come.

The following activities have been carried out over the last 12 months:

- **Planned giving program protocol.** Taking into account ongoing guidance from the Executive Committee and Financial Policy Committee, a detailed written protocol for making a planned gift was developed. The protocol provides explanations on (1) the importance of planned giving, (2) available giving options, (3) how to include the AABA in a will or trust, (4) sample bequest language, and (5) ways in which the AABA will recognize planned giving donors. It also establishes a newly formed AABA Legacy Society, of which planned givers can choose to be members. To avoid any potential legal issues, this protocol was reviewed and approved of by AABA's lawyer, Wes Kennedy, who also advised that donors be encouraged to consult with an attorney, financial advisor, or tax professional when planning a substantial gift.
- **Membership of the AABA Financial Policy Committee.** As part of this committee this past year and through attendance of virtual meetings with other members, the Early Career Liaison gained a better understanding of the AABA's budgetary matters, the responsibilities of the Treasurer, important timelines, and priority initiatives—most notably the development of a planned giving program.
- **Promotional materials.** To share information about the planned giving program with members in person, an advertisement infographic was designed by the Early Career Liaison with free consultation from a graphic designer. The infographic was printed and will be made available for pick up at the registration desk during the 2026 AABA meeting to help increase visibility to every member attending the annual meeting.
- **Dissemination to AABA members.** In addition to the planned giving infographic, a webpage was created to inform members of the recently established planned giving program. In collaboration with the AABA Secretary, the webpage was created and linked to through the AABA's official website. An update will be provided at the annual Executive Committee meeting on March 18, 2026 and it will be presented to all members attending the annual business meeting on March 20, 2026.