

# Ways to Support PAF: A Quick Guide to Giving

There are many impactful, tax-smart ways to support the Physician Associate Foundation (PAF). Use this guide to find those that best benefit you and help the profession thrive.

## 1 IRA Charitable Rollovers (Qualified Charitable Distributions) – For donors age 70½ and older

- **Contribution:** Give up to \$100,000 annually directly to PAF from your traditional IRA.
- **Benefits:** Reduces taxable income and satisfies Required Minimum Distributions.
- **First steps:** Contact your IRA custodian and request a Qualified Charitable Distribution to PAF. Provide them with PAF's full name: Physician Associate Foundation of the American Academy of Physician Associates; address: 2318 Mill Road, Suite 1300, Alexandria, VA 22314; and EIN 54-1071370.

## 2 Gifts of Stock or Appreciated Securities

- **Contribution:** Transfer stocks, bonds, or mutual funds to PAF.
- **Benefits:** Avoid capital gains taxes and receive a full-value charitable deduction.
- **First steps:** Contact your broker to initiate a transfer and request PAF's brokerage information.

## 3 Bequests / Legacy Gifts

- **Contribution:** Leave a gift to PAF in your will or living trust.
- **Benefits:** Creates a lasting legacy without impacting your current finances.
- **First steps:** Ask your attorney to include language such as: "I give [specific amount or percentage] to Physician Associate Foundation of the American Academy of Physician Associates, EIN 54-1071370."

## 4 Donor-Advised Fund (DAF) Grants

- **Contribution:** Recommend a grant to PAF through your donor-advised fund.
- **Benefits:** Streamlines giving, with tax benefits received at the time of DAF funding.
- **First steps:** Log in to your DAF provider (e.g., Fidelity, Schwab, or a community foundation) and search for PAF using EIN 54-1071370.

## 5 Beneficiary Designations

- **Contribution:** Name PAF as a beneficiary of your IRA, retirement plan, life insurance policy, or bank account.
- **Benefits:** Easy to update and avoids probate.
- **First steps:** Request a beneficiary form from your account provider and designate Physician Associate Foundation of the American Academy of Physician Associates as a full or partial beneficiary.

## 6 Charitable Trusts

- **Contribution:** Use a charitable remainder or lead trust to benefit both PAF and your heirs.
- **Benefits:** Provides income now or later while supporting PAF long-term.
- **First steps:** Work with a financial advisor or attorney to set up the trust structure.

## 7 Recurring Giving

- **Contribution:** Set up an automatic monthly, quarterly, or annual donation to PAF.
- **Benefits:** Provides reliable, year-round support that helps PAF plan ahead and sustain key programs.
- **First steps:** Visit [pa-foundation.org/donate](https://pa-foundation.org/donate) and select the "recurring gift" option. You can change the amount of your gift or cancel at any time.