



ABOUT THE PHYSIATRY FOUNDATION

The Physiatry Foundation is driven by a clear and compelling mission: **to create a thriving future for physiatry through funding innovative education and leadership initiatives.**

Guided by values of altruism, inclusivity, and academic excellence, the Foundation supports the next generation of physiatry leaders—strengthening programs, launching new initiatives, empowering diverse talent, and advancing global capacity.

The Foundation was established through the vision and generosity of the American Physiatric Education Council (APEC), supported by the APEC Board and royalties from their textbooks. Building on that foundation, the Physiatry Foundation now offers the entire physiatry community broader opportunities to give back and to champion innovative initiatives that advance education, leadership, and the future of our specialty.

In just the past year, the Foundation has:

- Supported scholarships for AAP’s renowned leadership programs – Program for Academic Leadership (PAL), Rehabilitation Medicine Scientist Training Program (RMSTP), and Advocacy and Public Policy Leadership Program (APPL).
- Launched the inaugural Pickleball Championship Games at Physiatry ’25.
- Introduced Mission Innovation, a grant program funding transformative projects in DEI, Global Outreach, Wellness, and Innovation in Education.
- Raised \$100,000 in individual donations, matched dollar-for-dollar by AAP for a total of \$200,000.

Have a vision for a legacy or scholarship that could make a difference? Let’s build it together.

WHY LEAVE A LEGACY?

- A planned gift allows you to make a meaningful, lasting impact on physiatry’s future.
- You may achieve personal, financial, and philanthropic goals—such as reducing tax burdens or shaping your estate plan—with the guidance of your tax/legal advisor.
- Joining our Legacy/Planned Giving program is a powerful way to support the specialty you value, ensuring that discoveries, training, leadership, and mentorship continue for future generations.

OPPORTUNITIES FOR PLANNED & LEGACY GIFTS

There are many ways to leave a legacy through the Foundation. Here are some common gift vehicles:

Current/ Outright Gifts – immediate impact with thoughtful planning

Gifts of assets that can be put to immediate use. Though they may require planning, they are among the most direct and impactful ways to give.

Appreciated Securities (Stock)

Donate publicly traded stock or mutual funds to make a meaningful gift while potentially avoiding capital gains taxes and receiving a charitable deduction.

Real Estate

Gifts of homes, land, or commercial property can provide substantial support. The Foundation carefully reviews each property before acceptance to ensure a smooth and responsible transfer.

Tangible Personal Property

Artwork, medical or educational equipment, or other valuable items may be accepted if they can further the Foundation’s mission or be converted to cash.

Qualified Charitable Distributions (QCDs)

If you are age 70 ½ or older, you may direct up to \$100,000 annually from your IRA to the Foundation. These transfers count toward your required minimum distribution and are excluded from taxable income.

Donor-Advised Fund (DAF) Gifts

Easily recommend a grant to the Foundation through your donor-advised fund. DAFs allow you to manage and distribute your philanthropy over time.

Future Gifts – plan now to make a difference later

These gifts are arranged now to benefit the Foundation later – often as part of your estate or long-term financial plans.

Bequests (Wills & Living Trusts)

Include the Physiatry Foundation in your will or living trust—designate a specific amount, a percentage, or the remainder of your estate. You can adjust the plans at any time.

Retirement Plan or IRA Beneficiary

Name the Foundation as a full or partial beneficiary of your retirement account. This often reduces income and estate taxes for heirs.

Life Insurance Gifts

Make a lasting impact by naming the Foundation as a beneficiary or owner of a life insurance policy. A significant gift can be made for a modest current cost.

Payable/ Transfer on Death (POD/ TOD) Accounts

Simplify your legacy planning by designating the Foundation as the beneficiary of a bank or investment account—avoiding probate and ensuring an efficient transfer.

Revocable Living Trust Gifts

Add the Foundation as a contingent or remainder beneficiary of your living trust. You retain full control during life while securing your philanthropic intent.

Gifts that Provide Income – support the Foundation while receiving lifetime income or tax benefits

These planned gifts create a win-win: you make a significant charitable commitment while receiving lifetime income or other financial benefits.

Charitable Gift Annuity (CGA)

Make an irrevocable gift in exchange for fixed annual payments for life. Enjoy immediate tax benefits and the satisfaction of supporting physiatry’s future.

Charitable Remainder Annuity Trust (CRAT)

Receive fixed payments each year based on the initial value of your gift. When the trust ends, remaining assets support the Foundation.

Charitable Remainder Unitrust (CRUT)

Provides annual payments that fluctuate with the trust’s value—offering flexibility and inflation protection. The remainder benefits the Foundation at the end of the term.

Charitable Lead Trust (CLT)

The trust provides income to the Foundation for a set period; then remaining assets return to you or your heirs—potentially reducing estate or gift taxes.

Pooled Income Fund

Join a shared investment pool that provides income for life. After your lifetime, your share supports the Foundation’s mission.

Additional Ways to Create a Legacy – support the Foundation while receiving lifetime income or tax benefits

Named & Endowed Funds:

Establish a lasting tribute in your name or honor someone special. Endowments can support causes such as scholarships, leadership, DIE initiatives, and global outreach—forever.

Combination Gifts:

Many donors choose to combine annual giving with a future gift, deepening their impact over time.

Professional Guidance:

We encourage you to consult your financial or legal advisors to explore how your gift can align with your personal goals and philanthropic vision.

(Important: this summary is for informational purposes only and not tax or legal advice. Please consult your professional advisor before making any planned gift.)

GIVING CIRCLES

We are pleased to recognize the generosity and commitment of our donors through the following circles:

LEGACY CIRCLE (\$50,000 +)

The Legacy Circle honors donors whose cumulative gifts over \$50,000 (annual, capital, and endowed) demonstrate a remarkable commitment to the future of physiatry.

In addition to highest-level recognition and all benefits of the lower tiers, this circle also enjoys the opportunity for named and endowed funds.

Within this tier are sub-categories:

- Visionary: \$250,000+
- Catalyst: \$100,000 – \$249,999
- Innovator: \$50,000 – \$99,999

MASTERS CIRCLE (\$10,000 +)

Recognizes donors whose cumulative gifts over \$10,000 show sustained commitment. Includes special gift benefits. Masters Circle candidates can make a consecutive 10-year \$1,000 annual pledge or can simply accumulate to the minimum gift over time.

- Platinum: \$25,000 – \$49,999
- Gold \$10,000 – \$24,999

CHAMPIONS CIRCLE (\$2,500 +)

Recognizes donors whose gifts of \$2,500 or more in the latest fiscal year.

- Silver: \$5,000 – \$9,999
- Bronze: \$2,500 – \$4,999

INNER CIRCLE - ANNUAL GIVING (\$25 – \$2,499)

- Leader: \$1,000 – \$2,499
- Builder: \$500 – \$999
- Ambassador: \$100 – \$499
- Friend: \$25 – \$99

Every gift matters and is recognized.

How to Get Started

Creating a lasting legacy with the Physiatry Foundation is easier than you might think. Whether you’re ready to make a commitment today or simply exploring your options, we’re here to help every step of the way.

1. Reflect on Your Values and Vision

Think about what matters most to you—advancing education, supporting innovation, promoting diversity, or expanding global rehabilitation access. Your legacy can be shaped around your passions and priorities in physiatry.

2. Explore Your Giving Options

There are many flexible ways to make a lasting impact. From a bequest in your will to establishing an endowed scholarship or naming the Foundation as a beneficiary, we’ll help you find the approach that fits your personal, financial, and philanthropic goals.

3. Consult Your Advisors

Before finalizing your plans, discuss your charitable intentions with your financial, tax, or legal advisor. They can help ensure your gift maximizes benefits for you, your loved ones, and the causes you care about.

4. Connect with Us

Once you’re ready—or even if you’re just curious—reach out to the Physiatry Foundation. We can:

- Provide sample language for wills or bequests
- Discuss opportunities to create a named or endowed fund
- Ensure your gift is used exactly as you intend
- Recognize your generosity through the Foundation’s giving circles

5. Share Your Legacy Intentions (confidentially)

If you’ve already included the Foundation in your estate plans, please let us know. Sharing your intentions helps us honor your wishes and welcome you into the AAP Legacy Circle, ensuring your impact is celebrated during your lifetime.

WE’RE HERE TO HELP

Let’s start a conversation about planning your legacy in physiatry

CONTACT INFORMATION

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Your gift today ensures a stronger tomorrow for physiatry.



BENEFITS OF MEMBERSHIP

- Recognition in the Foundation’s annual report and donor list
- Invitations to special events/networking opportunities
- Access to the Foundation’s community of changemakers
- For Legacy Circle: Named fund or endowment naming opportunities