



TMS
FOUNDATION

**Smarter Ways
to Give**



Minerals, metals and materials scientists and engineers are changing the world. By investing in our people with education, collaboration, and a diverse workforce we can ensure continuing innovation and transformation. Making a legacy gift to the TMS Foundation honors your commitment to strengthening our field both now and for future generations by:

- **Supporting the field you have dedicated your career to advancing.** Donating to the TMS Foundation creates opportunities for students and professionals to develop their careers and foster diversity and inclusion in the STEM community.
- **Providing long-term funding that lasts beyond your lifetime.** Legacy gifts strengthen our field for years to come.
- **Costing you nothing now.** Have a significant impact on the field of minerals, metals and materials without putting any financial stress on you or your loved ones. Legacy gifts are tax-exempt, potentially lowering your heirs' tax obligations.



"It's a positive feeling for one to contribute to a charitable organization that enhances opportunities for younger men and women who have chosen our profession."

**– Marty and
Lucinda Glicksman,
1871 Legacy Circle
members**

Important Information

Tax ID Number: 25-1484913

Legal Name: The Minerals Metal & Materials Society, Inc.

Include a Gift in Your Will

Including the TMS Foundation in your will (a bequest) is a meaningful way to support our profession and can be done by:

- Leaving a **specific dollar amount** or a **percentage of your estate** to the TMS Foundation.
- Making a **contingent gift**, meaning funds come to the TMS Foundation only if your other heirs do not survive you.
- Naming the TMS Foundation to receive the **residue of your estate** after all other beneficiaries.

If you already have a will, you can prepare a codicil, or amendment, to include the TMS Foundation. If you don't have a will, you can find sample bequest language on the Smarter Ways to Give section of the TMS Foundation website: www.TMSFoundation.org.

Name the TMS Foundation as a Beneficiary

Designate the TMS Foundation as a beneficiary of all or a percentage of your retirement plans, insurance policies and donor-advised funds and enjoy the flexibility of being able to adjust your beneficiaries at any time.

- **Individual Retirement Accounts (IRAs) and Qualified Retirement Plans.** Smart assets to leave to the TMS Foundation as they can be among the most heavily taxed when passed to heirs.
- **Life Insurance Policies.** Designate the TMS Foundation as the owner and/or beneficiary of a new or existing policy to make a bigger gift than possible during your lifetime.
- **Donor-Advised Funds.** Recommend grants to and name the TMS Foundation as a beneficiary to receive all or part of your fund.

Already made a legacy gift to TMS Foundation?
Please let us know by contacting us at
TMSFoundation@tms.org.

Receive Income Through a Charitable Trust

Creating an irrevocable charitable trust is a tax-savvy way to provide income to you or your loved ones during your lifetime while supporting students and professionals in the field of minerals, metals and materials. .

- **Charitable Remainder Trust.** Transfer assets and receive an immediate income tax deduction. The trust then pays you or another beneficiary an income. At the end of the trust term or beneficiary's passing, the remaining assets are gifted to the TMS Foundation.
- **Charitable Lead Trust.** Transfer assets and receive an immediate income tax deduction. The trust makes gifts to the TMS Foundation for a period of time. At the end of the trust term, the remaining assets pass back to you or another beneficiary.

Deed Your Property to the TMS Foundation

Real estate can be one of the most highly appreciated assets you own and a smart asset to use in making a legacy gift. When you make an outright gift of real estate to the TMS Foundation you:

- Receive an income tax deduction for the fair market value
- Avoid capital gains tax
- Remove the property from your taxable estate
- Reduce stress caused by property management

To continue living in your home, vacation property or farm, make a **retained life estate gift** by deeding part ownership of your property to the TMS Foundation. With this gift, you receive a current income tax deduction and remove the residence from your taxable estate while still enjoying lifetime use of the property.

**Please consult a legal or tax advisor to understand the best legacy plan for your personal situation.*



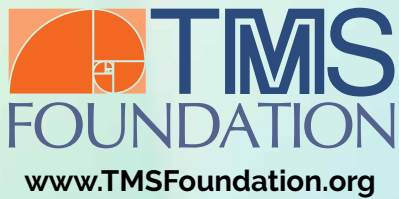
1871 Legacy Circle

The 1871 Legacy Circle recognizes individuals who have provided a legacy gift to the TMS Foundation. The name reflects the heritage of TMS: the American Institute for Mining, Metallurgical, and Petroleum Engineers (AIME), TMS's antecedent organization, that was established in 1871.

1871 Legacy Circle members:

- Receive special invitations to events and experiences
- Are recognized in *JOM: The Magazine*
- Are awarded a certificate of recognition
- Receive periodic updates on their impact
- Network with TMS Foundation Trustees and fellow supporters

We hope that your participation in the 1871 Legacy Circle brings you pride and satisfaction in knowing the impact you have on future leaders in the most critical stages of their career development. Together we are strengthening the field and preparing for a brighter future.



For questions or additional
information, please contact
TMS Foundation staff at:

TMSFoundation@tms.org

724-776-9000