


# SPONSORSHIP/DONOR OPPORTUNITIES





**Our mission—with your support—is to provide research-based information for homeowners, association board members, community managers, developers, and others. Since the Foundation's inception in 1975, we've built a solid reputation for producing accurate, insightful, and timely research for the community association housing model.**

Authoritative research sponsored by the Foundation supports the aspirations and work of the more than 74 million Americans who live and work in an estimated 358,000 community associations. As these communities continue to grow, so will the demand for community leaders and industry professionals who can keep these communities desirable and competitive in the housing marketplace.



Quality research requires commitment and investment. We value every single donation!

- We publish best practices reports on critical topics like energy efficiency, governance, financial operations, and strategic planning.
- We are the only source to publish exclusive data and statistics representing the community association housing model. Today, our research shows 25%–29% of the U.S. population resides in community associations, commonly referred to as homeowners associations, condominium communities, and housing cooperatives.
- We publish annual benchmarking surveys on salary and compensation for community association managers.
- We commission and publish the only Homeowner Satisfaction Survey in the world—data affirming residents are generally happy living in their community, with their governing board, and with their community association managers.
- We fund academic research to help community association stakeholders address specific challenges and prepare for emerging issues.
- We offer many ways for you to engage including sponsoring Best Practices Reports, Surveys and Snap Surveys, becoming a member of the Think Tank, and joining the Legacy Circle.

Our initiatives help ensure the success of community associations and the volunteers and professional who support them. The cost of quality research requires commitment and investment. We invite you to be part of the solution. The Foundation is a 501(c)(3) nonprofit organization. Your gift is tax-deductible to the extent allowed by law, and will help ensure the vital research necessary to make informed decisions is available when you need it.





## SPONSORSHIP OPPORTUNITY

### Community Association Management Company Operational & Financial Benchmarking Survey

**Sponsorship \$15,000 | 12-month contract**

The Community Association Management Company Operational & Financial Benchmarking Survey is the inaugural benchmarking survey by the Foundation for Community Association Research—examining revenue, expenses, and operational trends. The survey is a valuable tool for management companies, providing a snapshot of operations while enhancing our understanding of this growing and dynamic industry. The survey offers management companies an exclusive platform to compare their financial and operational data with other companies.

The Foundation works with community association industry experts to formulate the survey content and structure. An outside research firm administers the survey and compiles the data.

**Sponsorship Restrictions:** The Foundation reserves the right to impose restrictions on the type of company that may sponsor specific research report/publications to avoid the possibility of implying an endorsement of the sponsor. (Note: The Benchmarking Survey sponsorship is not available to community association management companies.)

**For information, please contact:**

Rebecca Diamond

Development Director

Foundation for Community Association Research  
[rdiamond@caionline.org](mailto:rdiamond@caionline.org)

## SPONSORSHIP FEATURES

*\*Only two sponsorships are available: Sponsorships are not available to management companies.*

- Company recognition included on the survey data collection portal.
- Company recognition on individual management company reports (1,000 estimated quantity). Complimentary reports are given to participating management companies and available in several formats (spreadsheet, slideshow, and PDF).
- Company recognition on the Foundation homepage slider (12 months | 2 versions).
- Company recognition on the Foundation webpage (video option available).
- Company recognition in survey promotional video (Featured on @CAISocial YouTube channel).
- Sponsor recognition included in social media promotion (bimonthly on @CAISocial Facebook, Twitter, Instagram, and LinkedIn).
- Company recognition as sponsor in digital publication.
- Sponsor receives a full-page ad in digital publication.
- Sponsored content/thought-leadership article (optional with Foundation editorial approval) included in the digital publication.
- Promotional video opportunity with company weblink (60 seconds max) in digital publication (video provided by sponsor).
- Lead generation emails and social media: Community Associations Institute all-member email and social media campaigns (approximately 33k recipients and extensive social media reach) with sponsor recognition (four times throughout the 12-month term). Content will include substantive elements of the survey. Emails and social media campaigns will be used to generate opportunities for sponsor.

## SPONSORSHIP OPPORTUNITY

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### Community Association Operational & Financial Benchmarking Survey

**Sponsorship \$15,000 | 12-month contract**

The Community Association Operational & Financial Benchmarking Survey is the inaugural benchmarking survey by the Foundation for Community Association Research—examining revenue, expenses, and operational trends. The survey is a valuable tool for community associations, providing a snapshot of operations while enhancing our understanding of this growing and dynamic industry. The survey offers community associations an exclusive platform to compare their financial and operational data with other associations. The Foundation works with community association industry experts to formulate the survey content and structure. An outside research firm administers the survey and compiles the data.

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Rebecca Diamond

Development Director

Foundation for Community Association Research

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## SPONSORSHIP OPPORTUNITY

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### Community Association Manager Compensation & Salary Survey

**Sponsorship \$15,000 | 12-month contract**

#### Community Association Manager Compensation & Salary Survey

The 2023 Community Association Manager Compensation and Salary Survey is the eighth salary survey conducted by the Foundation since 2000. The valuable benchmarking report is designed to allow a company or manager to compare its compensation and benefit levels with industry peers. The information represents complete, accurate, and up-to-date compensation data on the community association industry.

In addition to providing basic company and manager profile and salary information, the survey includes the following features:

- Compensation outlook for the community association industry.
- Compensation by job title, presented by regions and states, for management company CEOs, company executives, high-rise managers, on-site managers, portfolio managers, and assistant community managers.
- Compensation by job title, presented by regions and states, for large-scale managers and employees at large-scale communities including the assistant general manager, architectural review manager, business/finance manager, communications/member services/marketing manager, events manager, facilities manager, fitness center manager, grounds manager, human resources manager, IT/computer systems manager, public safety/security chief, and recreation/lifestyle manager.
- Salary comparisons for managers holding professional credentials.
- Data based on community association and management company size.
- Information on employee benefits, health coverage, and retirement plans.
- Ability to customize and download the data into slideshow charts and spreadsheet tables.
- Much more!

The Foundation for Community Association Research works with community association industry experts to formulate the content and structure of the survey. An outside research firm administers the survey and compiles the data. If you have any questions, please feel free to email us at [foundation@caionline.org](mailto:foundation@caionline.org).

**Sponsorship Restrictions:** The Foundation reserves the right to impose restrictions on the type of company that may sponsor specific research report/publications to avoid the possibility of implying an endorsement of the sponsor. (Note: The Compensation & Salary Survey sponsorship is not available to community association management companies.)

#### For information, please contact:

Rebecca Diamond  
Development Director  
Foundation for Community Association Research  
[rdiamond@caionline.org](mailto:rdiamond@caionline.org)



## SPONSORSHIP FEATURES

*\*Only two sponsorships are available: Sponsorships are not available to management companies.*

- Company recognition on individual community association manager salary and compensation reports (2,000 estimated quantity). Participating individuals receive a complimentary report available in several formats (spreadsheet, slideshow, and PDF).
- Company recognition on the Foundation homepage slider (12 months | 2 versions).
- Company recognition on the Foundation Compensation & Salary Survey webpage (video option available).
- Company recognition in compensation and salary promotional video (featured on @CAISocial YouTube channel).
- Social media promotion with sponsor recognition (bimonthly on Facebook, Twitter, Instagram, and LinkedIn).
- Company recognition as sponsor in digital publication.
- Sponsor full-page ad in digital publication.
- Sponsored content/thought-leadership article (optional with Foundation editorial approval) included in the digital publication.
- Opportunity for company promotional video (60 second max) in digital publication (sponsor will provide video).
- Lead generation emails and social media: CAI all-member email and social media campaigns (approximately 33k recipients and extensive social media reach) with sponsor recognition (four times throughout the 12-month term). Content will include substantive elements of the salary survey. Emails and social media campaigns will be used to generate lead opportunities for sponsor.
- Tentative topics to include:
  - Salary comparison based on credentials.
  - Benefit highlights.
  - Large-scale community highlights.
  - Salary comparison based on job title and/or region.



## SPONSORSHIP OPPORTUNITY

### Best Practices Reports

#### Sponsorship \$15,000 | 12-month contract

Function-specific best practices in topic areas such as energy efficiency, governance, reserve studies, community harmony and spirit, financial operations, strategic planning, and transition have been developed using a variety of sources, including recommendations from industry experts and various industry-related publications.

The outcomes of the Best Practices Reports include:

- Documented criteria for function-specific best practices.
- Community association case studies.
- The development of a showcase on community excellence.

The Best Practices Reports are excellent resources for community association homeowner leaders, committee members, and community association managers to gain a broader perspective on these important topics. The Best Practices Reports are available for free download on the Foundation for Community Association Research website and are available in CAI's online bookstore.

The following Best Practices Report topics have been published:

- [Community Harmony & Spirit](#)
- [Community Security](#)
- [Energy Efficiency](#)
- [Ethics](#)
- [Financial Operations](#)
- [Governance](#)
- [Green Communities](#)
- [Natural Disasters](#)
- [Reserve Studies](#)
- [Strategic Planning](#)
- [Transition from Developer to Homeowner Control](#)

**Sponsorship Restrictions:** Sponsorship is not available to service providers specifically affiliated with the topic area of the best practices report. The Foundation reserves the right to impose restrictions on the type of company that may sponsor specific research report/publications to avoid the possibility of implying an endorsement of the sponsor.

#### For information, please contact:

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[rdiamond@caionline.org](mailto:rdiamond@caionline.org)

## SPONSORSHIP FEATURES

*\*This is an exclusive sponsorship.*

- Company recognition on the Foundation homepage slider (12 months | 2 versions).
- Company recognition on the Best Practice Report webpage (video option).
- Company recognition in the Best Practice Report video (Featured @CAI Social YouTube).
- Social media promotion with sponsor recognition (bimonthly on Facebook, Twitter, Instagram, and LinkedIn).
- Company recognition as sponsor in digital publication.
- Sponsor full-page ad in digital publication.
- Sponsored content/thought-leader article optional (Foundation editorial approval) included in the digital publication.
- Opportunity for video link promoting the company (60 seconds max) in digital publication (sponsor provides video).
- Lead generation emails and social media: CAI all-member email and social media campaigns (approximately 33k recipients and extensive social media reach) with sponsor recognition (two times throughout the 12-month term). Content will include substantive elements of the Best Practices Report. Emails and social media campaigns will be used to generate lead opportunities for sponsor.



## SPONSORSHIP OPPORTUNITY

### Snap Survey Sponsorship

**\$1,500 per survey**

The Foundation for Community Association Research conducts a series of Snap Surveys, and you can sponsor one or many! Each survey is sent to all Community Associations Institute members, approximately 33,000 emails.

Using industry experts, our Snap Surveys are short, pointed questions in topic areas such as energy efficiency, governance, pool maintenance and staffing, reserve studies, community harmony and spirit, financial operations, strategic planning, and more.

The Snap Surveys are excellent resources for community association homeowner leaders, committee members, and community association managers to gain a broader perspective on these important topics. Snap Surveys are available for free download on the Foundation website.

### Snap Survey Topics

- Short- and long-term rentals
- Labor shortage and inflation impact on pool openings
- Reserve studies and funding
- Office trends [in-person, remote, hybrid]
- Inflation impact on community association budgets
- Cyber security
- More to come

**IMPORTANT INFORMATION:** If you have a topic you would like to sponsor a snap survey on, please reach out. We also may offer regional snap surveys upon request if viable.

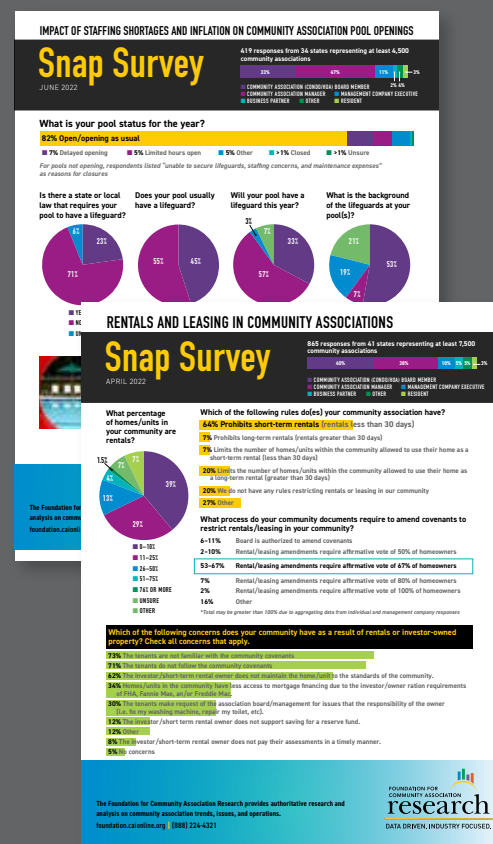
For information, please contact:

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Foundation for Community Association Research  
[rdiamond@caionline.org](mailto:rdiamond@caionline.org)

## SPONSORSHIP FEATURES

*\*This is an exclusive sponsorship.*

- Company name or logo included and thanked in survey email to 33,000 member emails.
- Company name or logo included in survey results sent to members and available for free on Foundation website.





# THINKTANK

Since 1975, the Foundation has served as the research arm of CAI and the common interest community industry, providing reports and analysis about the 358,000 residential communities in the United States.

The Foundation's mission is to provide authoritative research and reliable analysis of trends, issues, and operations that support sustainable communities. The Foundation's goal is to be the go-to resource for information about this industry, and those who build, manage, and support it. The Foundation is an integral part of CAI, but it functions as an independent, tax-exempt entity focused on research and data collection about common interest communities.

## **Think Tank Purpose**

Think Tank is a group of influential leaders of the common interest community industry. Think Tank participants contribute their time, a minimum annual gift of \$2,500, and insights to help the Foundation expand and enhance its research and information-sharing activity. Think Tank donations increase the Foundation's ability to conduct new research and issue publications of value to community and association leaders around the world.

In 2015, the Foundation established Think Tank "founding members" and recruited 10 subject-matter experts who represent a cross-section of the industry and have financial capacity to make ongoing major gifts. Since then, the group has doubled in size and formalized its process. It meets three times a year to learn of the progress on our research agenda and to share rising trends it sees in its line of work. From there, these topics often turn into discussion groups that meet regularly to flesh out the topic. During these meetings, they identify if research is necessary for the Foundation to provide valuable data related to the community association housing model.

## **Think Tank Organization**

Think Tank is not a club or society that provides members with tangible benefits (this would make Think Tank donations non-tax-deductible), nor does it have a formal organizational structure with bylaws. It is important to note that Think Tank does not compete with CAI initiatives such as President's Club.

## **Target Members**

- Foundation and CAI leaders (past presidents and board members).
- CAI business partners and allied professionals.
- Senior community management executives.
- Community developers and homebuilders.
- Community association advisors (attorneys, accountants, insurance executives, bankers).
- Influential community leaders and residents.



## Membership Criteria

To be invited to join the Think Tank, individuals should be:

- Involved in some aspect of planned/managed community operation in a leadership capacity.
- Expert in their field.
- Active CAI member.
- Willing to make a minimum donation of \$2,500.
- Interested in providing input about Foundation research in meetings, focus groups, etc.
- Available to review research committee proposals and reports as needed.
- Able to identify peer reviewers, writers, etc.
- Prepared to promote the Foundation as a Think Tank member.
- No more than one-fourth of Foundation board members may join the Think Tank at any one time.

## Member Benefits

- Opportunity to submit recommendations for the Foundation research agenda.
- Recognition in Foundation publications and annual report.
- Inclusion in one annual recognition piece in CAI's *Common Ground™* magazine (printed and digital).

- All benefits have minimal market value to maintain donation tax-deductibility.
- Additional benefits may be adopted for members who fund sponsored research projects (TBD).

## Membership Expectations

- Membership is individual, no matter how the Foundation donation is paid (e.g., by the member's company, employer, or association).
- Membership is voluntary, meaning that invitations to join Think Tank can be issued only by Foundation board members; there is no self-nomination process.
- Membership is intended to be honorary and exclusive, meaning there may be limitations on total number of members or members from same industry segment.
- Think Tank membership is not a binding contract, meaning there is no formal commitment for continued participation.
- Think Tank membership is private, meaning the Foundation has no obligation to publish member names and contributions other than required reports to the IRS.
- Think Tank membership is informal, meaning there is no organizational structure or operational agenda, i.e., no bylaws, officers, or annual report.

## THINK TANK RECRUITMENT

- By invitation only, issued by the Foundation Board of Directors.
- Year-round process: Membership renews on July 1 each year of initial contribution.
- Gift is recorded as unrestricted gift to the Foundation.

### Process

- Prospect qualified by Foundation Research Committee, with confirmation of interest sector representation.
- Board member delivers invitation to join Think Tank; follow up with director of development.
- Name and identifying information added to Think Tank publicity materials.

### Message

- To be delivered by Foundation board member(s) in person or via telephone.
- Offer opportunity to set research agenda and see measurable return on investment for donations.
- Emphasize tax-deductible status of Foundation contributions.
- Not focus on member benefits as this negates tax-deductibility of donation.

## Think Tank Operations

### *Foundation Board*

- Provide general oversight of Think Tank activity.
- Help to identify and recruit prospective members.
- Welcome letter to new Think Tank members from Foundation president, director of development, and executive director.
- Ensure that Think Tank donations are used for Foundation research activity.
- Identify and recruit Think Tank members.

### *Fundraising and Marketing Committee*

- Oversee process to vet and solicit prospective members.
- Provide guidance and develop materials for recruitment of Think Tank members.
- Develop plans for public recognition of Think Tank.
- Include information about Think Tank in Foundation annual report.

### *Research Committee*

- Consider recommendations from Think Tank members for research contractors and activity.
- Provide semi-annual report of research activity for distribution to Think Tank members.

### *Director of Development*

- Manage day-to-day contact with Think Tank members.
- Respond to external inquiries about Think Tank.
- Post Think Tank information on website and in promotional materials.
- Track prospect identification and vetting process with CAI leaders as needed.
- Handle implementation of Think Tank meetings and special events.
- Provide reports for Foundation president, executive director, and committee chairs as needed.
- Provide information on Think Tank to CAI leadership and chapter executives.

## Think Tank Research Project Process

During Think Tank meetings, members discuss trending issues specific to the community association housing model. During these meetings, the group may decide topics are worthy of further discussion. As such, small groups are convened to discuss the topic. As appropriate to ensure a wide range of perspective across the community association housing model, additional individuals are invited to participate in the conversation. Once a concept is fully developed, it is presented to the full Think Tank for a vote. If members agree to move the project along, it advances to the Foundation Research Committee for consideration. If the committee approves the project, it advances to the full Foundation board for consideration and inclusion in the budget.

Think Tank members do not have decision-making roles in choosing Foundation research projects, selecting contractors who conduct Foundation research, or approving publication of Foundation research reports. These roles are reserved for the Foundation Board of Directors, and they must be protected and preserved to maintain the Foundation's reputation, integrity, and nonprofit status.

Updated: Approved by Foundation Board of Directors, June 15, 2021.



# Think Tank Members

The Foundation for Community Association Research applauds Think Tank members for their volunteer leadership on important research projects for the community association industry. These include *Breaking Point*, which examines the hidden costs associated with aging infrastructure, *Creating Harmony in Diverse Communities*, which investigates discrimination claims in community associations and the benefits of holding neighborhood gatherings and increasing communication with residents, and *Attracting Talent to the Community Association Management Industry*, which discusses increasing the pipeline of community association managers and informing efforts to find, recruit, mentor, and position community managers for success in their careers.

Year after year, Think Tank members invest their time and resources for the benefit of the entire industry. Please join us in thanking them for their generous support.



**Adrian Adams, Esq.**  
2022–2023 President,  
Foundation for Community  
Association Research  
Honorary Member



**Michelle Baldry, RS**  
Northeast Regional Executive  
Director  
Reserve Advisors, LLC



**Tyler P. Berding, Esq.**  
Principal  
Berding & Weil, LLP



**Steven Y. Brumfield,**  
CMCA, AMS, PCAM  
Vice President & National  
Director, Community  
Association Group  
Toll Brothers



**Eric Collins,**  
Principal/Vice President MEP  
Becht Engineering BT, Inc.



**Lincoln C. Cummings**  
Principal  
Cummings & Associates



**Andrew Daniels**  
Vice President, Business  
Development  
Allied Universal



**Kevin Davis, CIRMS**  
President  
Kevin Davis Insurance  
Services



**Alan De Tata**  
President CAB  
CIT Community Association  
Banking



**Todd El-Taher,**  
Executive Vice President,  
Sales & Marketing  
Hann & Hann Construction  
Services



**John Hammersmith,**  
CMCA, AMS, PCAM  
CEO  
Hammersmith Management,  
Inc.



**Sabine Liedel, CMCA**  
Vice President Homeowners  
Association Services  
Union Bank



**Lori Ann Long, CIRMS**  
President/CEO  
Community Association  
Underwriters of America,  
Inc.



**Michael Mendillo**  
President & Principal  
FirstService Residential  
Mid-Atlantic / Carolinas



**Margey Meyer, CMCA, PCAM**  
President  
CADRExperts



**Peter Miller, RS**  
Principal  
Miller + Dodson Associates



**Robert Nordlund, PE, RS**  
Founder & CEO  
Association Reserves, Inc



**George E. Nowack, Jr.,**  
Esq.\*  
Co-founder  
NowackHoward, LLC



**Edward J. O'Connell, Esq.**  
Partner  
Whiteford, Taylor &  
Preston, LLP



**Henry D. Puckett,**  
CMCA, AMS, PCAM  
Community Association  
Manager Resource Team  
Leader  
Ghertner & Company



**Vishnu Sharma, CPA,**  
CFE, EBP  
2023 President, Community  
Associations Institute  
Honorary Member



**Marc Tamres**  
Founder and CEO,  
HomeRun IQ, Inc.



**Jared Tunnell**



**Debra A. Warren,**  
CMCA, PCAM  
Vice President, Learning &  
Development  
Associa



**Sue York**  
Educational Researcher  
The UHM Curriculum  
Research & Development  
Group (CRDG)

\*College of Community Association Law (CCAL) fellow

# LEGACY CIRCLE

## Building Today to Reach Tomorrow

The Legacy Circle campaign is a new philanthropic giving fund to ensure the Foundation for Community Association Research can provide research-based information for homeowners, association board members, community managers, developers, and other stakeholders. To ensure our industry resources remain at the forefront of our changing landscape, we are inviting investors to sponsor our projects in full or in collaboration with others.

The Legacy Circle members are community association leaders, like you, who have been part of the establishment as leaders, founders, and business owners. The Legacy Circle also is a terrific opportunity for those who are preparing to sell (or have sold) their company, those who are achieving their exit plan, or those who have financial success in our industry and want to make sure we continue to thrive.

## Legacy Circle Member Levels of Giving and Benefits

### \$10,000 four-year recognition (can be paid out over multiple years)

- Listed on Legacy Circle landing page.
- Name listed in the Foundation's annual report.
- Crystal plaque with your name engraved; Legacy Circle member exclusive.
- Acknowledgement on LinkedIn.
- Honored at the next CAI Annual Conference and Exposition: Community Now as inaugural member of Legacy Circle.

### \$15,000 four-year recognition (can be paid out over multiple years)

- Listed on Legacy Circle landing page.
- Name listed in the Foundation's annual report.
- Crystal plaque with your name engraved; Legacy Circle member exclusive.
- Acknowledgement on LinkedIn quarterly.
- Honored at the next CAI Annual Conference and Exposition: Community Now as inaugural member of Legacy Circle.

### \$25,000 five-year recognition (can be paid out over multiple years)

- Listed on Legacy Circle landing page.
- Name listed in the Foundation's annual report.





- Crystal plaque with your name engraved; Legacy Circle member exclusive.
- Acknowledgement on LinkedIn quarterly.
- Honored at the next CAI Annual Conference and Exposition: Community Now as inaugural member of Legacy Circle.
- Included in recognition video roll during major events hosted by Community Associations Institute and the Foundation for Community Association Research.

### **\$50,000 lifetime recognition (can be paid out over multiple years)**

- Listed on Legacy Circle landing page.
- Name listed in the Foundation's annual report.
- Crystal plaque with your name engraved; Legacy Circle member exclusive.
- Acknowledgement on LinkedIn.
- Honored at the next CAI Annual Conference and Exposition: Community Now as inaugural member of Legacy Circle.
- Included in recognition video roll during major events hosted by Community Associations Institute and the Foundation for Community Association Research.
- Priority seating for two at CAI Annual Conference and Exposition: Community Now.
- Monthly "thank you" acknowledgement on LinkedIn and other social media.
- Article in Foundation's electronic newsletter, *Catalyst*, about Legacy Circle giving and mention of your generosity.
- Video presentation of your "why" statement (Why you believe in the Foundation) to be shown at CAI Annual Conference and Exposition: Community Now and posted on the Foundation website; length two minutes.
- Visual and verbal recognition at CAI Annual Conference and Exposition: Community Now for five years.

### **\$100,000 lifetime recognition (can be paid out over multiple years)**

- Listed on Legacy Circle landing page.
- Name listed in the Foundation's annual report.
- Crystal plaque with your name engraved; Legacy Circle member exclusive.
- Acknowledgement on LinkedIn.
- Honored at CAI Annual Conference and Exposition: Community Now as inaugural member of Legacy Circle; introduced at the event with highest level of attendance (dinner, luncheon).
- Included in recognition video roll during major events hosted by Community Associations Institute and the Foundation for Community Association Research.
- Exclusive invitation for two to Legacy Circle gathering with CAI and Foundation Board of Directors at CAI Annual Conference and Exposition: Community Now.
- Priority seating for two at CAI Annual Conference and Exposition: Community Now.
- Monthly "thank you" shout out on LinkedIn and other social media.
- Article in Foundation's electronic newsletter, *Catalyst*, about Legacy Circle giving and mention of your generosity.
- Video presentation of your "why" statement (Why you believe in the Foundation) to be shown at CAI Annual Conference and Exposition: Community Now and posted on Foundation website; length three minutes.
- Visual and verbal recognition at CAI Annual Conference and Exposition: Community Now for five years.
- On-stage speaking and introduction of special guests at major events hosted by Community Associations Institute and the Foundation for Community Association Research.

The Legacy Circle is an individual giving program. For more information about the Legacy Circle or corporate giving, contact Rebecca Diamond at [rdiamond@caionline.org](mailto:rdiamond@caionline.org) or 703-568-1911.





## General Donations to Foundation

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Your donation is essential to the continued growth of the Foundation and future research initiatives. You can help support the Foundation and our mission by making a tax-deductible contribution.

### Ways to Donate

- Donate through our [secure online donation form](https://cai-foundation.networkforgood.com/) at <https://cai-foundation.networkforgood.com/>.
- Mail a check made out to the Foundation for Community Association Research to:  
Foundation for Community Association Research  
6402 Arlington Boulevard, Suite 500  
Falls Church, VA 22042
- Donate stock directly to the Foundation. For more information, contact Bruce Townsend, Chief Financial Officer, at (703) 970-9264 or [btownsend@caionline.org](mailto:btownsend@caionline.org).

### Memorial and Honorary Donations

A donation In Honor of or In Memory of a loved one is a respectful way to show your appreciation for their contributions to our industry. On our [donation site](https://cai-foundation.networkforgood.com/), at <https://cai-foundation.networkforgood.com/> you can select the amount you want to give and add the name of the person whose life you are honoring as well as the individual we need to inform about your gift (we do not disclose gift amount unless you request this option). We'll send you a tax acknowledgement receipt for your record-keeping and send a letter to your recipient alerting them that you donated in their honor or in memory of their loved one.

### Donations to specific Foundation research programs

You also can designate your donation to a specific Foundation research program or initiative such as our Byron Hanke Fellowship or Community Association Fact Book. Please specify with your payment which Foundation program(s) you would like to support.

# Bequests to the Foundation for Community Association Research

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## Through Your Will or Trust

A bequest in your will or trust can be tailored to complement your financial goals while also supporting the Foundation for Community Association Research. It is the simplest way to make a significant gift to the Foundation without affecting your assets during your lifetime.

If you decide to include a gift for the Foundation in a bequest, please notify us so that we can thank you and make sure that we have a clear understanding of your plans. Your notification will be treated confidentially, if you so desire.

By including the Foundation in your estate planning, you are ensuring that millions of vibrant communities worldwide will continue to have access to the necessary resources they need to make well-informed decisions.

### How bequests work:

- Include a bequest to the Foundation for Community Association Research in your will or trust.
- Make your bequest unrestricted or direct it to a specific purpose at the Foundation.
- Indicate a specific amount or a percentage of the balance remaining in your estate or trust.

### Benefits to your estate:

- Your assets remain in your control during your lifetime.
- You can modify your bequest to address changing circumstances.
- You can direct your bequest to a particular purpose (Be sure to check with us to make sure your gift can be used as intended).
- Under current tax law there is no upper limit on the estate tax deduction for your charitable bequests.





## General bequest language:

"I give, devise, and bequeath to the Foundation for Community Association Research, located at 6402 Arlington Blvd., Suite 500, Falls Church, VA 22042, the sum of \$\_\_\_\_\_ (or a description of the specific asset), for the benefit of the Foundation for Community Association Research and its general purposes."

The Foundation for Community Association Research is a recognized 501(c)(3) nonprofit. Our tax identification number is: 23-7438451

## Frequently asked questions about bequests:

### Will my gift be tax-deductible?

Historically, bequests have been deductible for federal estate tax purposes. In addition, the gift is usually exempt from state inheritance taxes\*.

### What if I've already written my will or trust?

You can amend a will or trust to make a gift without rewriting the entire document. Your attorney can prepare the simple statement, called a codicil, which adds a new provision while reaffirming the other terms of your will. Similarly, he or she can prepare an amendment to your revocable trust to add the Foundation as a beneficiary.

### What's the difference between a will and a trust?

A will serves as an instruction manual to your survivors about how you want your property distributed. It's a revocable document that only takes effect after your death.

A revocable trust (also called a living trust) is a legal entity that can hold assets during your lifetime, then transfers ownership of them—or benefit from them—upon your death. Unlike a will, assets that pass through a trust will not be subject to the probate process.

There is no difference between wills and revocable trusts in the way transfers from them are taxed. In some states, however, the probate and distribution process is simpler with a revocable trust. Your advisers can help you choose which vehicle will work best for you.

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