



FOREVER FRIENDS

A PLANNED GIVING GUIDE

Maximize giving, minimize taxes
and create a living legacy at
Helen Woodward Animal Center

**People Helping
Animals**
*and Animals
Helping People*





animalcenter.org



BEQUESTS

One of the simplest ways to make a planned gift to Helen Woodward Animal Center is to make a bequest in your will. If you already have a will, your lawyer can usually add a codicil to include the Center. Giving through a bequest lowers your federal estate taxes because the assets donated to the Center are deducted before the estate tax is calculated.

PET BEQUESTS

Many friends of the Center who choose to make a bequest also arrange to entrust their pet(s) to the care of the Center after their passing. While placement with a trusted family member or friend who may already know and love the pet is often ideal, sometimes this is not possible. To accommodate such cases, Helen Woodward Animal Center offers the Pet Bequest Program that allows an owner to bequeath their pet to the Center and enjoy the comfort of knowing their loving companion will have a safe place to go in the event the owner passes, or is no longer able to care for their pet. This is a guarantee for the lifetime of the pet.

LIFE INSURANCE

A gift of life insurance is an excellent way to make a sizable contribution that does not tie up current assets, that provides immediate tax savings and that helps ensure the Center's future. You may make the Center the owner and beneficiary of a life insurance policy that you no longer need. If the policy is fully paid up, your deduction equals the cost or replacement value of a new policy with comparable benefits. You may also take out a new policy that names the Center as beneficiary. The premiums you pay are tax-deductible, and in time, the value of the policy will far exceed your net contributions.

CHARITABLE GIFT ANNUITY

A Charitable Gift Annuity (CGA) can provide guaranteed income for life by providing the mature donor with lifetime payments through better yield on fixed income assets, such as CDs and bonds, and reduce portfolio risk. In addition, the CGA will generate a tax deduction and allow remaining assets to be used to support the Center.

CHARITABLE REMAINDER TRUST

A Charitable Remainder Trust (CRT) gives you the flexibility to design a trust to meet your individual financial goals and provides an income for life. By establishing a Helen Woodward Animal Center CRT, all account values go to the benefit of Helen Woodward Animal Center to further its mission when the donor passes on. In short, the Helen Woodward Animal Center CRT epitomizes the Center's slogan of "People helping animals and animals helping people" by providing people with tax deductions and income for life, while also leaving a lump sum of money for the animals.

APPRECIATED SECURITIES

A popular alternative to a cash gift is a gift of appreciated securities, which generate a double tax benefit. If an investor has an appreciated stock or mutual fund that they purchased more than a year ago, they can donate those securities to a charity and receive a tax deduction for the fair market value of the securities. In this way they can eliminate any capital gains assessments on the future sale of the securities.

QUESTIONS about the various Planned Giving opportunities?

Please do not hesitate to contact **Renée Resko, Vice President of Development,** at **858-756-4117 ext. 347** or via email: **ReneeR@animalcenter.org**

FIND THE GIFT THAT'S RIGHT FOR YOU

“The care Helen Woodward Animal Center gives to the adoptable animals in their charge, combined with the educational and community service programs, make them an organization we are proud to include in our estate planning.”

— MINDY S.



The following sample language can be shared with your estate planning professional and easily incorporated into your estate document:

“I give to Helen Woodward Animal Center:

Federal I.D. 23-7228287

PO Box 64

Rancho Santa Fe, CA 92067

**A gift of \$ _____ to be used as needed OR ____ %
of the residue of my estate to be used as needed.”**

In order to make Helen Woodward Animal Center a beneficiary of a variety of accounts from IRA's to checking and savings, please use the following information:

NAME: Helen Woodward Animal Center

ADDRESS: PO Box 64,
Rancho Santa Fe, CA 92067

FEDERAL TAX ID: 23-7228287

Planned gifts often provide lifetime monetary benefits to the donor and their family, along with considerable tax savings, and the satisfaction of knowing that they are helping ensure the future of the Center and its many programs for generations to come. There are a wide range of giving opportunities available, whether you choose an outright gift, a gift that provides payments to you or another type of gift, your contributions help Helen Woodward Animal Center with its mission.

Thank you for your interest in including Helen Woodward Animal Center in your estate plans. The Center offers a variety of planned gift opportunities designed to meet individual financial needs.

For additional information you can call 858-756-4117 or visit our website at animalcenter.org.

The information contained in this brochure is meant as a guide only. Individual results may differ. Please consult your own financial advisor before entering any gift arrangement.

