

## Tips to get started!

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. 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 the 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



**HELEN WOODWARD ANIMAL CENTER**  
*People Helping Animals and Animals Helping People.*

**(858) 756-4116 ext.347**  
**ReneeR@animalcenter.org**  
**animalcenter.org/PlannedGiving**

Planned gifts often provide lifetime monetary benefits to the donor and their family, 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.

*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.*



# FOREVER FRIENDS

## A PLANNED GIVING GUIDE

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



**HELEN WOODWARD ANIMAL CENTER**  
*People Helping Animals and Animals Helping People.*





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.

*"I feel a gratitude that brings tears to my eyes as I write this—that these two beloved friends now have a backup plan in case I become unable to care for them. And not just somewhere to go, but the best place imaginable, where they will be treated with kindness, love, and expertise, and will likely find a new home where they will be loved and well cared for. That, to me, is priceless..."*

— NANCY K.



## 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 GUARDIANSHIP

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 Guardianship Program. This program 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, provides immediate tax savings, and 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, 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.

## AN IRA QUALIFIED CHARITABLE DISTRIBUTION (QCD)

For those who are 70 1/2 years and older you can give any amount (up to a maximum of \$111,000) this year from your IRA directly to a qualified charity such as Helen Woodward Animal Center without having to pay income taxes on the money. Gifts of any value \$111,000 or less are eligible for this benefit and you can feel good knowing that you are making a difference for the pets and the programs at Helen Woodward Animal Center. This popular gift option is commonly called the IRA charitable rollover, but you may also see it referred to as a qualified charitable distribution, or QCD for short.

## 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.

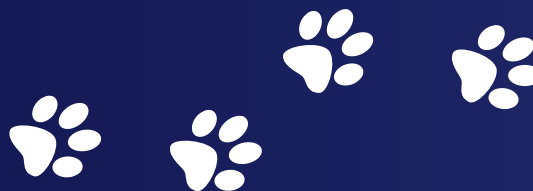
## APPRECIATED SECURITIES

A popular alternative to a cash donation is a gift of appreciated securities, which offers a double tax benefit. If you have stocks or mutual funds that have increased in value and have been held for more than one year, you can donate them directly to a charity. In return, you may receive a charitable deduction for the full fair market value of the assets, while also avoiding capital gains tax that would apply if you sold them. This same benefit may also apply when donating appreciated real estate to a qualified charitable organization.



## CONTACT

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**LEARN MORE AT:**  
[animalcenter.org/PlannedGiving](http://animalcenter.org/PlannedGiving)