

## What is Charitable Planned Giving?

Planned Giving refers to the process of making a charitable gift of some or all your assets to one or more not-for-profit organizations. It is a gift that requires consideration, thoughtful planning and is a part of a donor's overall financial and estate plan. Gifts can be made during a donor's lifetime or afterward. Planned Giving enables philanthropic individuals or donors to support causes in which they have a strong belief. Some planned gifts provide a life-long income to the donor while others use estate and tax planning techniques to provide for charities and their heirs in ways that maximize the gift and/or minimize impact on the donor's estate. The benefits of thoughtful planned giving can make this type of charitable giving very attractive to both the donor and charity whether a donor uses cash, appreciated securities/stock, real estate or any other type of financial instrument or asset.

## Why is your Planned Gift important for the animals?

Making a planned gift to Anderson Animal Shelter is an excellent way to ensure that your love and compassion for animals continues to benefit homeless pets and the community for many years to come. Planned gifts allow the shelter to continue its mission, fulfill its vision, plan for the future, maintain programs and expand future ones where necessary. The shelter's budget in 2016 is @\$1,800,000. Yearly budget increases of 3-5% are expected. You can help ensure Anderson's future.



## Trusted Companion Society

You will become a valued member of our Trusted Companion Society by naming the shelter in your estate plans. This special group includes donors who have demonstrated an extraordinary commitment to the shelter's future. Members of the Trusted Companion Society receive special recognition and invitations to exclusive events throughout the year. Inquire about the Pet Guardianship program and how it relates to the Trusted Companion Society. We encourage you to let us know if you have included the shelter in your estate plans so that we may honor you as a member of The Trusted Companion Society.

## What is Next?

It is never too early to start planning. We ask that you work closely with your attorney and/or financial planner to create the best possible gift and to ensure proper planning for you and your family. Please contact Anderson Animal Shelter Development Department for additional information or to inform us of your estate planning intentions.



**Anderson  
Animal Shelter**  
- A Humane Society -

To contact for information:

**Anderson Animal Shelter**  
Susan Lyons, Director of Major Donor Programs  
1000 South LaFox (Rte 31)  
South Elgin, IL 60177

PH: 874-697-2880 x 31  
[slyons@andersonanimalshelter.org](mailto:slyons@andersonanimalshelter.org)  
[www.andersonanimalshelter.org](http://www.andersonanimalshelter.org)



**Anderson  
Animal Shelter**  
- A Humane Society -



# Planned Giving Guide

Help Secure the Future for  
Companion Animals

# Planned Giving in support of Anderson Animal Shelter

## Planned Giving Options

Please consider these options if you are considering a planned gift to Anderson Animal Shelter:

**Bequests** - legal directions in a Will to provide a disbursement of funds or property to a named charity. This is the most common form of planned giving and is the simplest, provided you have a Will. Bequests to charities can help lower estate taxes.

**Gifts from Trusts** - provisions in your Trust directing that a charity is to receive a disbursement of funds or property. Similar to bequests, these gifts can help lower estate taxes.

**Gifts from retirement plans** - making a charitable gift from your retirement plan will allow you to avoid income taxes assessed when funds are withdrawn from your account and could help lower estate taxes.

**Gifts of life insurance** - whether you transfer ownership of an existing policy to Anderson, purchase a new policy naming Anderson as the beneficiary, or name Anderson as a beneficiary of an existing policy, gifts of life insurance can be a versatile way to help ensure Anderson's financial future. In the case of whole life policies, you may be able to take an immediate charitable tax deduction for the net value of the policy at the time of an ownership transfer.

**Charitable Gift Annuity** - a legal contract between yourself and a charity that provides for a lifetime of guaranteed income for you and/or your beneficiary in exchange for your irrevocable gift of cash or securities to the charity. The older you are at the time of your gift, the larger the income you will receive. In addition, you will receive an immediate partial tax deduction. There are also potential savings in capital gains tax and estate taxes.

**Charitable Lead Trust** - a way to lower taxes and benefit both charities and your beneficiaries. These trusts can be

created either during your lifetime or upon your death. There is an immediate charitable deduction when the trust is created. The Charity receives all or a portion of the income for a set period of time - all, of course, tax free - and your beneficiaries receive the remainder tax free.

**Charitable Remainder Trust** - allows you to make a generous contribution to a charity while simultaneously providing income to yourself or your beneficiaries. Cash, securities, real estate or other assets are irrevocably transferred into a trust managed by a trustee for your benefit or that of your beneficiaries. When the last beneficiary dies, the remainder of the trust is transferred to the charity.

Other charitable giving options exist, including:

- Donor Advised Funds
- Pooled Income Funds
- Appreciated securities
- Bank and Investment accounts
- Personal property
- Real estate
- US savings bonds

*Last Will and Testament*

Article 1: Bequeaths to Charity

"I give and bequeath to Anderson Animal Shelter, a 501(c)3 not-for-profit corporation that is located at 1000 South LaFox, South Elgin, IL 60177, the sum of \$ \_\_\_\_\_, or \_\_\_\_\_% of my estate to be used for the accomplishment of and any general purpose of its defined mission."

**To Leave a bequest to Anderson Animal Shelter, you can use the following language in your will:**

"I give and bequeath to Anderson Animal Shelter, a 501(c)3 not-for-profit corporation that is located at 1000 South LaFox, South Elgin, IL 60177, the sum of \$ \_\_\_\_\_, or \_\_\_\_\_% of my estate to be used for the accomplishment of and any general purpose of its defined mission."

