

## Animal Friends

Animal Friends, Southwestern Pennsylvania's premier companion animal resource center, is committed to building, nurturing and respecting the human-animal bond and creating a community where our relationship with companion animals is guided by compassion. It is our mission to:

- provide for the well-being of companion animals in need, while adhering to our no-kill tradition, and find each a lifelong, loving home;
- act as an advocate on behalf of animals and as an enforcer of their rights and protection;
- reduce animal overpopulation through education and supportive programs;
- promote a bond of mutual assistance between people and animals; and
- instill respect for, and appreciation of, all living beings.

Animal Friends is a 501(c)3 charity, with a federal ID number of 25-0951565.

This brochure reviews Animal Friends' Planned Giving Program, which includes bequests, life insurance and charitable trusts.



Considering Animal Friends in your estate planning is a meaningful way to help further the organization's mission by creating a lasting legacy. Planned gifts enable Animal Friends to continue to provide essential services to the animals and people of the community, while building a strong foundation for the future.

### The Lifesavers Society

Membership in this special society offers peace of mind by providing donors with the option to leave their cat, dog or rabbit in the care of Animal Friends at the time of the donor's death. Donors who make planned gifts of \$5,000 or more per pet may participate in this program.

Animal Friends will care for the pets until loving, suitable homes can be found, in accordance with placement policies. This arrangement ensures that their pets will continue to receive top-quality care, without the threat of unwarranted euthanasia.

Lifesavers Society members should make sure that their wishes are fulfilled by:

- Including necessary information about pets in their estate planning documents, specifically the names, breeds and approximate ages of their animals.
- Making wishes for pets known to a family member or friend.
- Keeping updated notes about pets, including likes, dislikes, medical history or behavior concerns, all of which will be important in finding appropriate homes.
- Keeping medical records and phone numbers of their veterinarian in planning documents.
- Sharing information about pets and intentions with Animal Friends. Remember that the more information Animal Friends attains, the better donors and pets can be assisted.

### Bequests

By remembering Animal Friends in a will, donors can ensure that their gift continues in perpetuity. The following is suggested language for bequeathing a dollar amount, specific property, percentage or residue, or a pet:

#### Dollar Amount

"I give, devise, and bequeath to Animal Friends, Inc. of Pittsburgh, PA, \$\_\_\_\_\_."

#### Specific Property

"I give, devise, and bequeath to Animal Friends, Inc. of Pittsburgh, PA, (*description of property*), located at (*exact location*)."

#### Percentage or Residue

"I give, devise, and bequeath to Animal Friends, Inc. of Pittsburgh, PA, all or \_\_\_% of the remainder of my estate after all taxes, liens, and debts have been paid."

#### Your Pet (Lifesavers Society Members)\*

"In addition to my gift of \_\_\_\_\_ to Animal Friends, Inc. of Pittsburgh, PA, I also bequeath my cat/dog/rabbit named \_\_\_\_\_ to be placed into a suitable home in accordance with Animal Friends' placement policies."

*\*Note that bequests or other planned gifts must equal or exceed \$5,000 per pet in order to participate in the Lifesavers Society.*



## Life Insurance

A gift of life insurance is a simple way to make a meaningful contribution to Animal Friends. For a modest annual expenditure, life insurance can enable donors to make a meaningful gift not otherwise possible.

A life insurance gift can be an Existing-Cash Value Policy or a New Policy. Donors can buy insurance to replace a bequest or add Animal Friends as the beneficiary of an existing policy.

- A donor can make Animal Friends the owner and beneficiary of a policy already owned. The donor then receives an income tax deduction for the value of the policy on the date of the transfer of ownership.
- By purchasing a life insurance policy and naming Animal Friends as owner and beneficiary, a donor receives an income tax deduction when future premiums are paid.
- Animal Friends, Inc. can be named as a secondary or final beneficiary of a new or existing policy. If the first beneficiary/ies predeceases the donor, Animal Friends becomes the beneficiary.

## Charitable Trusts

A trust can be established to set aside money or other assets to provide income for a donor or another person. Charitable trusts have the additional advantage of establishing a tax-deductible gift for qualified nonprofits such as Animal Friends.

### Charitable Remainder Trusts

A Charitable trust is established by transferring money or appreciated assets to a trustee to be held for the benefit of Animal Friends. The donor specifies the amount of income to be distributed, to whom it is to be paid, and the duration of payments. At the death of the last income beneficiary, the trust will terminate and Animal Friends will receive the proceeds.

### Charitable Lead Trusts

A lead trust is essentially the reverse of a charitable remainder trust. The donor establishes a trust that pays the income to Animal Friends for a term of years (of any duration), after which the property either reverts to the donor or passes to another specified non-charitable beneficiary.

## For More Information

Animal Friends has retained the services of a tax and estate-planning attorney. This attorney is available to assist you and your advisor in drafting a will or other documents necessary to fulfill your charitable intentions.

If you have questions about making a planned gift to Animal Friends, contact Kraig Makohus, Director of Development, at 412.847.7052 or email him at [kmakohus@ThinkingOutsideTheCage.org](mailto:kmakohus@ThinkingOutsideTheCage.org).

Animal Friends does not render legal or tax advice. When considering a planned gift, the services of an attorney or other professional advisor should be obtained. The purpose of this publication is to provide accurate information of a general character only.



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