



Ensuring a Legacy
of Compassion for
Our Animal Friends

Animal Friends'
Planned
Giving



Including Animal Friends in your estate planning is a meaningful way to create a lasting legacy and ensure a second chance to thousands of homeless animals. By leaving a gift for Animal Friends in your will, trust, or other account, you're making your love for animals and their well-being part of your life story. For years to come, your gift will help Animal Friends:

Reduce the number of unwanted pets through aggressive spay/neuter programs,

Provide for the well-being of animals in need and find each a loving home consistent with our no-kill tradition,

Promote education and therapeutic animal programming,

Offer affordable wellness services to pets and owners in need targeting underserved communities,

And, act as an advocate on behalf of animals in crisis and as an enforcer of their protection.

Anyone can make a planned gift. And, through these planned gifts you can make the greatest impact on the meaningful programs and services that Animal Friends has to offer, while achieving your legacy goals and objectives at the same time.

Explore the many ways you can ensure that Animal Friends will be able to save lives into the future.

A Gift in Your Will or Living Trust

A simple way to ensure Animal Friends can continue its lifesaving work for years to come is by making a gift in your will or living trust, known as a charitable bequest.

Bequests can be made in the form of a specific dollar amount or property. Alternatively, your whole estate or a certain percentage or residue of your estate can be left to Animal Friends. Your planned gift also entitles your estate to an unlimited federal estate tax charitable deduction.

For your convenience, we have provided some suggested language that you could use in your will or estate. Please feel free to adapt this language with your attorney to fit your individual situation.

Specific Gift Language

I give and devise to Animal Friends, Inc., (Tax ID # 25-0951565) located in Pittsburgh, PA, the sum of \$_____ (or asset) to be used for its general support (or for the support of a specific program).

Residual Gift Language (a residual gift comes to us after all other estate expenses and bequests are paid)

I give and devise to Animal Friends, Inc., (Tax ID # 25-0951565) located in Pittsburgh, PA, all (or ____ percentage) of the rest, residue and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or program).



An Easy Way
to Make a
Lasting Impact

Beneficiary Designations

A gift by beneficiary designation is one of the easiest ways to give. Simply name Animal Friends as a beneficiary to receive assets such as retirement plans, life insurance policies or any other beneficiary assets. You simply fill out a beneficiary designation form separate from your will and designate Animal Friends, Inc. as a full or partial beneficiary.

It's not only an easy way to give, it's also flexible – you aren't locked into the choices you make today. You can review and adjust beneficiary designations anytime you want.

You can name Animal Friends beneficiary of the following assets:

Retirement Plans including IRAs and 401k's

Life Insurance

Annuities

Bank Accounts, Certificates of Deposit or Brokerage Accounts

Your financial or legal advisor can provide guidance on which assets will or will not trigger taxable income when paid to a beneficiary.



Continue
Supporting Our
Mission After
Your Lifetime



Peace of
Mind for You
... and Your
Pets

The Lifesaver Society

Oftentimes we are able to arrange for family or friends to provide care for our pets should something happen to us. Unfortunately, sometimes this is not possible and we are left with the unsettling prospect of an uncertain future for our beloved pets. This is where Animal Friends can step in and provide peace of mind.

By making a planned gift* of \$5,000 or more per pet you can become a member of Animal Friends' Lifesavers Society. As a member, your dog, cat or rabbit will receive guaranteed, immediate entry into our compassionate, holistic network of care. Animal Friends will provide all necessary social, behavioral and medical care and treatment for your pet until he or she is placed into a loving home** matched with his or her needs and personality traits.

Program Promises

You have the opportunity to write detailed care instructions that will be given to your pet's future guardians.

Your pet will have access to our network of foster homes and cared for there if adoption is not immediate.

While under our care, your pet will continue to receive socialization, enrichment and medical care and vaccines, as needed, from our veterinary staff.

**Animal Friends can accept real estate or investment assets as well as cash bequests.*

***In accordance with our placement policies, please note that in keeping with our commitment to reduce pet overpopulation, Animal Friends will spay/neuter and microchip all animals adopted through the Lifesaver Society. Also note that any animal adopted through Animal Friends is guaranteed to be accepted back into our care if for any reason the adoptive home can no longer provide necessary care.*

Charitable Trusts

Provide
for Your Loved
Ones and
Animal Friends

Do you want to benefit from the tax savings that result from supporting Animal Friends, yet don't want to give up assets that you'd like your family to receive? You can have it both ways with a charitable trust.

There are two types of charitable trusts you can choose from:

Charitable Remainder Trusts

A charitable remainder trust is established by transferring money or assets into a trust under which a trustee is directed to make income distributions to non-charitable beneficiaries for a period of time. At the end of the term, the remainder of the trust assets are then passed outright to Animal Friends.

Charitable Lead Trusts

A charitable lead trust is essentially the reverse of a charitable remainder trust. You can establish a trust that pays the income to Animal Friends for a term (you can choose any number of years), then the property either reverts to you, as the donor, or passes to another specified non-charitable beneficiary.

We encourage you to work with a qualified attorney or financial advisor to provide guidance with setting up a trust.





See Your
Generosity in
Action Today

Retirement Accounts

Another easy and flexible way you can support Animal Friends is by designating Animal Friends as a beneficiary of your retirement accounts or other financial accounts including brokerage accounts and CDs as well as money market, savings and checking accounts.

Many people don't know that their retirement and other financial accounts can be a simple and practical way to not only help Animal Friends but even themselves at tax time. Through a beneficiary designation form, you can add Animal Friends as a beneficiary of 10, 20 or even 100 percent. You can also name Animal Friends as a secondary beneficiary in case someone you have named is unable to claim his or her portion.

If you are 70½ years old or older, you can give up to \$100,000 from your IRA directly to a qualified charity like Animal Friends without having to pay income taxes on the money you donate.

This law no longer has an expiration date so you are free to make annual gifts to our organization allowing you to see the difference your donation is making today. If you have not yet taken your required minimum distribution for the year, your IRA charitable rollover gift can satisfy all or part of that requirement.

To name Animal Friends on your beneficiary designation form, please use the following information:

**Animal Friends, Inc.
562 Camp Horne Road,
Pittsburgh, PA 15237**

**Tax ID#: 25-0951565
501 (c)(3) Organization**

Life Insurance

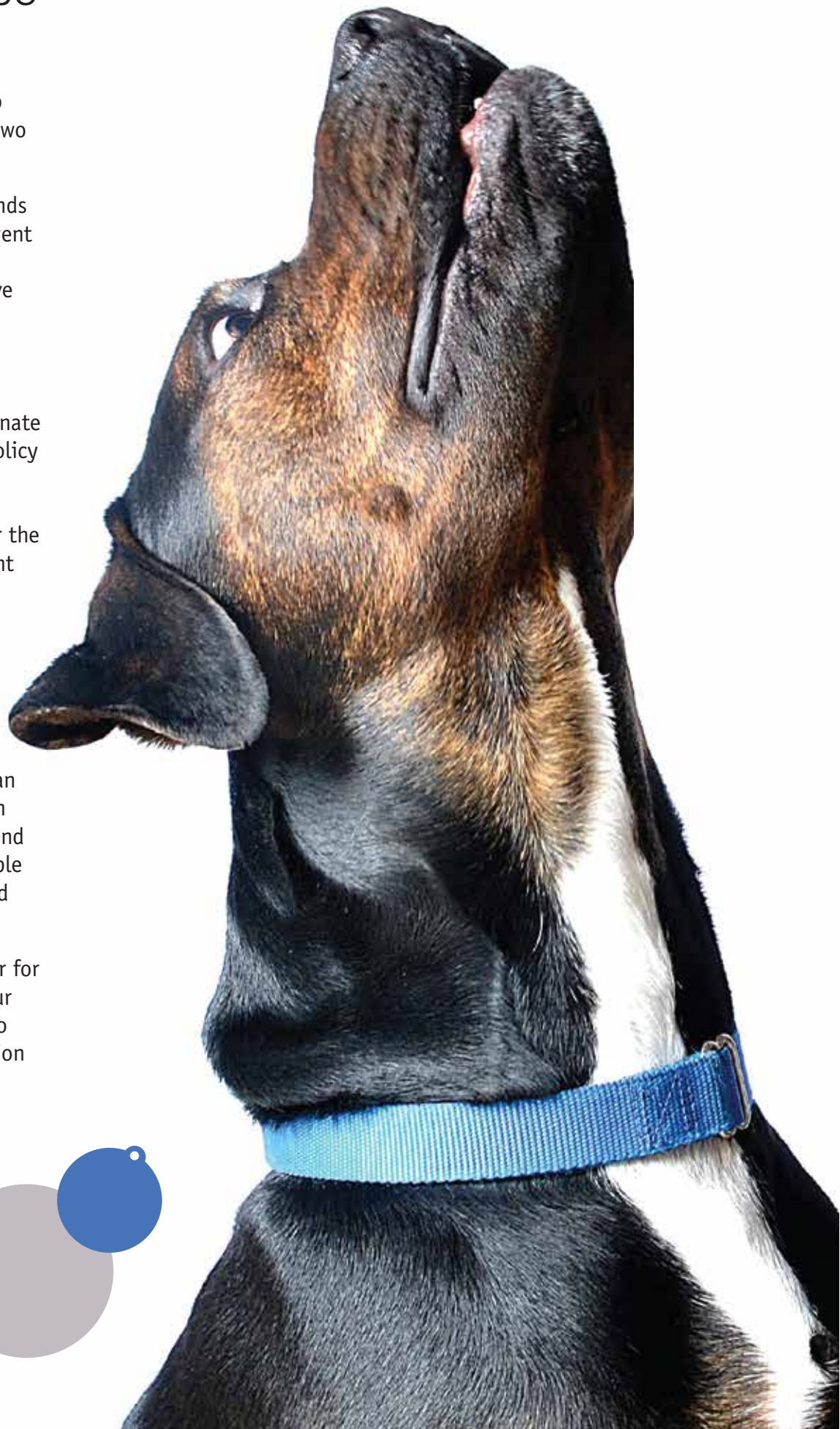
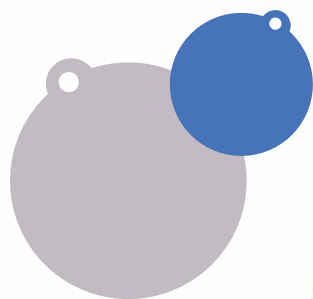
A gift of life insurance is a simple way to make a meaningful contribution to Animal Friends. There are two ways you can do this:

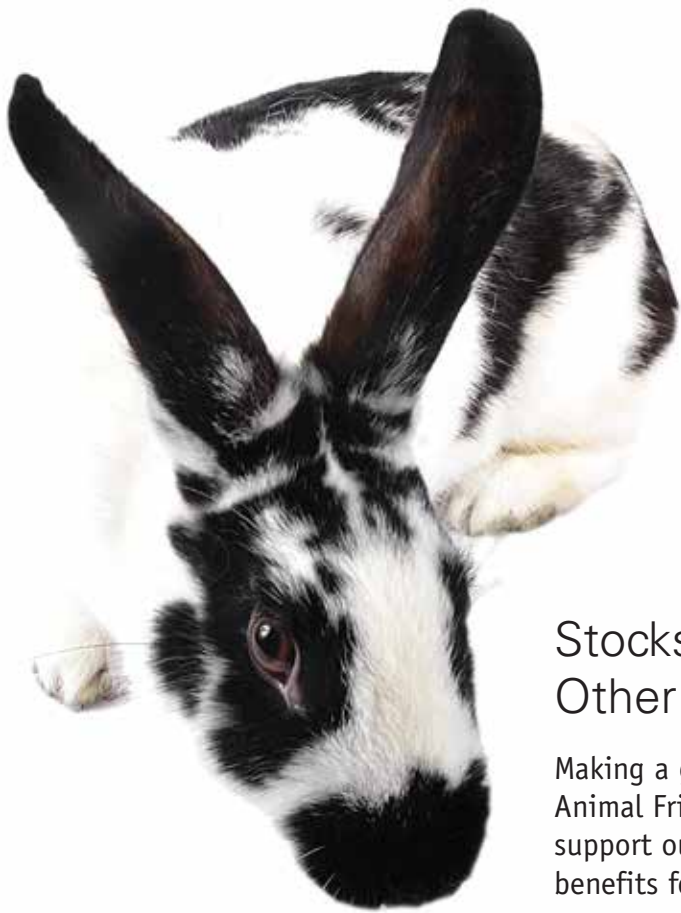
You may name Animal Friends as a full, partial or contingent beneficiary of any policy. (Remember many of us have employer-sponsored life insurance purchased at no cost to you.)

The second option is to donate outright a life insurance policy that is no longer needed. Animal Friends could then decide to hold or surrender the policy to receive the current cash value.

You may even choose to purchase a new life insurance policy and name Animal Friends as owner and beneficiary. This way you may receive an income tax deduction when future premiums are paid and you can create a gift capable of doing much greater good in the future.

Ask your insurance provider for more details or consult your legal or financial advisor to help you decide which option is best for you.



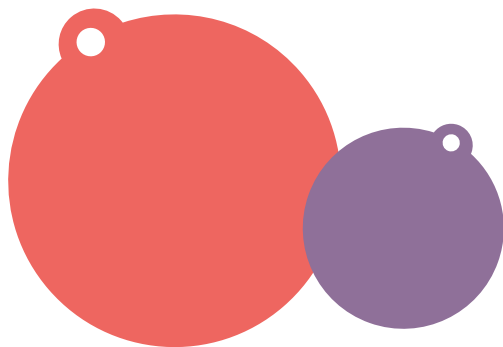


Stocks, Mutual Funds and Other Gifts

Making a gift of stocks or mutual funds to Animal Friends gives you the opportunity to support our work while realizing important benefits for yourself.

When you donate appreciated securities or mutual funds to Animal Friends in support of our mission, you can potentially eliminate federal capital gains taxes on the transfer. You are also entitled to a federal income tax charitable deduction based on the fair market value of the securities at the time of the transfer.

You may also donate jewelry, real estate or other valuables. Please keep in mind, however, that some of these gifts require more planning and have specific restrictions. We encourage you to speak with your financial planner before donating these items.



Planned Giving with Animal Friends



Your Benefits

It costs you nothing now to leave a gift in your will and it takes nothing more than your signature.

You can change your mind at any time. You're not locked into your decision.

There's no minimum gift. Any amount you give is gratefully welcomed and will make a difference in the life of an animal.

You can provide for your loved ones and at the same time create your legacy with Animal Friends.

Your gift demonstrates your belief and commitment to improve the lives of animals in crisis.

Our Promises

You'll be recognized for your generosity. Of course, you can remain anonymous if you prefer.

Your gift will be used in the way that you intend.

You can change your plans or your beneficiaries at any time.

As a multi-year Four Star Rated Charity through Charity Navigator, you can be assured we meet the highest standards of financial transparency and integrity.

We want your legacy gift to do exactly what you intend it to do. Providing us with documentation is the best way to ensure that your wishes are honored. We ask that you complete a confidential Letter of Intention so that we can have a written record of your generosity. It's a non-binding agreement, strictly for our records so we can stay in touch with you about your intentions and interests as well as keep you up to date on our lifesaving work.

There are many ways that you can include Animal Friends in your estate planning. For more information or sample language that can be used in your estate plans, please contact a member of our planned giving team at 412.847.7095 or **PlannedGiving@ThinkingOutsideTheCage.org**.

Key Information

Legal name: Animal Friends, Inc.
Tax ID Number: 25-0951565
Incorporated in: Pittsburgh, PA

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 nature only.



Vision Statement

To ensure the well-being of companion animals, while ending overpopulation, abuse and unwarranted euthanasia.

Mission Statement

Animal Friends, a premier companion animal resource community, is committed to promoting the animal-human bond and nurturing relationships with companion animals which are guided by compassion.

It is our mission to:

Reduce the number of unwanted animals through aggressive spay/neuter programs;

Provide for the well-being of companion animals in need, while adhering to our no-kill tradition, and find each a lifelong, loving home;

Offer affordable wellness services and resources to pets and owners in need targeting underserved communities to support whole life care;

Promote the animal-human bond through outreach, education and therapeutic programming;

And, act as an advocate on behalf of animals in crisis and as an enforcer of their rights and protection through education, investigation and legislative efforts.

We are deeply committed to these goals while ensuring the financial security and stability of the organization for future generations.



AnimalFriends

562 Camp Horne Road

Pittsburgh, PA 15237

412.847.7000

ThinkingOutsideTheCage.org