



Legal Name: The Animal Mission  
Federal Tax ID # 57-0921521

# Planned Giving

There are many ways to include Animal Mission's lifesaving work in your will or estate plans. In addition to the tax benefit you'll receive, your gift will make a meaningful and lasting impact on the pets in the Midlands.

## Ways to Give

- Stock and Bonds
- IRA Charitable Rollover
- Will or Trust
- Retirement Assets (IRA, 401k, 403b, pension, or other tax deferred plan)
- Life Insurance
- Real Estate

## Stock and Bonds Gifts

You may give securities to Animal Mission by transferring the shares into our brokerage account. As the funds are needed, we'll liquidate the shares and use the proceeds to benefit our programs.

You may take a tax deduction equal to the fair market value of the security on the date of transfer and avoid any capital gain tax you may have incurred if you'd sold the security instead. You may also be able to reduce income and capital gains taxes, if they apply in your situation.

Your gift can be electronically transferred to us by contacting your brokerage firm and initiating a transfer. Contact [plannedgiving@animalmission.org](mailto:plannedgiving@animalmission.org) for assistance.

## IRA Charitable Rollover

A charitable IRA rollover is a direct contribution made from your traditional or Roth IRA to a public charity like Animal Mission. Your contribution is excluded from your taxable income and may not exceed \$100,000 per year. Charitable IRA rollover distributions count toward required minimum distributions.

Please contact us at [plannedgiving@animalmission.org](mailto:plannedgiving@animalmission.org) for help making a transfer from your brokerage account to Animal Mission.

## Will or Trust

Making a gift through your will or revocable living trust is a simple and flexible way to save the lives of pets for years to come. If you have already named Animal Mission in your will or trust, please let us know your plans. We'd like to thank you for joining us in our work towards No Kill status in the Midlands.

There are several ways that you can make a gift through your will or trust:

- **Specific gift:** You designate exactly what kind of gift you want to leave to our organization and the designated source. If you want to leave a specific dollar amount from a specific source or a particular item (such as a piece of property or a collector's item), this is the type of bequest you would use.
- **Residuary gift:** This type of bequest is honored after all other bequests have been made, and all debts, expenses and taxes have been paid.
- **Contingent gift:** This type of bequest is fulfilled if certain conditions are met. For instance, if your primary beneficiary does not survive you, you can indicate your next choice through a contingent bequest.

## Retirement Assets

A gift of your surplus retirement assets, such as from your IRA, 401(k), 403(b), pension or other tax-deferred plan, is an excellent way to make a planned gift to Animal Mission. Typically, retirement plan balances are subject to both income and estate taxes, often resulting in a loss of 60-70% of the asset value. As a nonprofit organization, we won't pay income tax on the distribution nor will the gift be subject to estate tax.

Your retirement assets may be transferred to us by completing a beneficiary designation form provided by your plan custodian.

## Life Insurance Gifts

You may designate Animal Mission as primary or contingent beneficiary of your life insurance policy. You'll continue to own the policy during your lifetime. The policy will be included in your taxable estate when you pass away, but your estate will benefit from an estate tax charitable deduction for the amount of the gift to us.

Your gift of your life insurance policy may be transferred to us by completing a beneficiary designation form provided by your plan custodian.

## Gifts of Real Estate

Your real property, including a home, commercial property, vacation property, farmland, or timberland may be gifted all or in part to Animal Mission by executing a deed transferring ownership. The gift's value for tax purposes will generally be based on the property's fair market value, which must be established by an independent appraisal.

Your gift of real property may be transferred to us by contacting your attorney or real estate agent/broker and requesting a deed transfer.

## Benefits of Planned Giving

- Many options avoid capital gains tax and/or estate tax for you or your heirs
- You'll qualify for a charitable income tax deduction based on the value of the gift.
- You'll keep control over your pledged assets, should you need them during your lifetime.
- You'll retain the ability to update your gift anytime, should your circumstances or desires change.
- You'll be making a gift to Animal Mission that may be larger than any gift you could make during your lifetime.
- You can determine how the funds will be used upon realization of the gift.
- Planned giving often involves little effort or paperwork to set up.
- **Your gift will leave a lasting legacy of kindness to our organization and the homeless pets of the Midlands.**



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