



Three Easy Ways to Make A Planned Gift

Bequest

A gift from a will (or from a trust) allows you to make a future donation to the Humane Society of Charlotte. The following are samples of appropriate bequest language to share with your attorney:

Specific bequest - States a specific amount or asset amount. It may be a gift of cash, securities, real estate or tangible personal property.

Examples:

I give *[specific dollar amount or asset]* to **Humane Society of Charlotte, Inc. [58-1342479]** or its successor to be used for the unrestricted needs of the organization.

I give *[specific dollar amount or asset]* to **Humane Society of Charlotte, Inc. [58-1342479]** for endowment.

Residuary bequest – Names **Humane Society of Charlotte, Inc. [58-1342479]** as recipient of all or a percentage of the remainder of the estate after specific bequests have been fulfilled.

Examples:

I give *[X percent]* or *[the remainder]* of my residual estate to **Humane Society of Charlotte, Inc. [58-1342479]** or its successor for the unrestricted needs of the organization.

I give *[X percent]* or *[the remainder]* of my residual estate to **Humane Society of Charlotte, Inc. [58-1342479]** for the purpose of endowment.

Retirement Plan Assets

Retirement plan assets are often considered the attractive option for making a planned gift since these are among the most tax burdened assets in an estate. Making a future gift of retirement plan assets to your favorite organization, such as **Humane Society of Charlotte, Inc.** may reduce estate tax liability, while allowing you to leave assets that receive more favorable tax treatment to other beneficiaries (i.e., your descendants).

To make a charitable gift of retirement assets, you need to complete a new beneficiary designation form naming the charity as a percentage beneficiary. When designating the charitable organization, please remember to include the complete organization name and address, as well as the organization's Employment Identification Number (EIN) to ensure accuracy.

Humane Society of Charlotte, Inc.
2700 Toomey Avenue
Charlotte, NC 28203
Tax ID/EIN: 58-1342479

Life Insurance Policies

You may use one or more whole life insurance policies to make a future gift to your favorite organization, such as ***Humane Society of Charlotte, Inc.*** To use a life insurance policy to make a gift, you could name the organization as a percentage beneficiary of a new or existing policy or transfer ownership of a new or existing policy to the beneficiary organization.

As with retirement plan assets, using a life insurance policy to make a charitable gift can be as simple as completing a new beneficiary designation naming the charity as a percentage beneficiary. Again, please include the complete organization name and address, as well as the organization's EIN when naming it as the beneficiary, to ensure accuracy. If you chose to name ***Humane Society of Charlotte*** as a life insurance beneficiary, for example, you would include the following information:

Humane Society of Charlotte, Inc.
2700 Toomey Avenue
Charlotte, NC 28203
Tax ID/EIN: 58-1342479

** There are many vehicles to making a planned gift and the above is a brief overview. This document is not intended to provide tax or legal advice and should not be relied on as such. Potential donors should consult with their legal and tax counsel to understand the implications of a specific charitable gift.*

If you have any questions, please contact Donna Canzano Stucker, Vice President of Development and Community Relations at 704.494.7704 or dstucker@humanecharlotte.org.