



Include a Gift to The Animal Haven in Your Estate Plan and Become a Member of The Animal Haven Legacy Society!

Including a gift to The Animal Haven in your estate plan enables you to support our mission and make a difference in the lives of homeless and abandoned dogs and cats for many years to come.

There are multiple ways you can include The Animal Haven in your estate planning:

➤ **Make a Bequest to The Animal Haven in Your Will or Revocable Living Trust**

Your bequest can be:

- a specific dollar amount;
- specific property, such as stock or real property;
- a percentage of your estate; or
- the remainder of your estate, after specific bequests to loved ones have been made.

You can make The Animal Haven a primary beneficiary or a contingent beneficiary of your bequest. If The Animal Haven is a primary beneficiary, it will receive your bequest at the end of your lifetime. As a contingent beneficiary, it will receive your bequest only if your other heirs and beneficiaries do not survive you.

Here is sample language you can use for your will or revocable living trust :

“I give (or bequeath) to The Animal Haven, Inc., a non-profit, charitable organization, in North Haven, CT, EIN 06-0735382, the following assets:
_____ [or ___ % of my estate] to be used to
accomplish its general purpose [or for a specific purpose as indicated].”

➤ **Transfer a Bank or Investment Account to The Animal Haven**

You can designate a bank or investment account as “payable on death” or “transfer on death.” Whatever money or securities remain in the account at the end of your life will then pass directly to The Animal Haven.

To choose this option, simply request the appropriate form from the financial institution where your account is located.

➤ **Make The Animal Haven a Beneficiary of Your Retirement Account**

You can name The Animal Haven as a beneficiary of your IRA, 401(k) or other qualified retirement account. This can result in significant tax savings, because funds in these types of accounts are typically taxable when left to heirs, but not taxable if left to a charitable organization. The Animal Haven will receive the full balance of the account.

Your retirement plan administrator can provide a beneficiary form for you to name The Animal Haven, Inc. as your sole or partial beneficiary.

➤ **Use Your Life Insurance Policy to Make a Legacy Gift to The Animal Haven**

You can name The Animal Haven as a beneficiary of your life insurance policy. It is relatively simple to make a change to the beneficiary of your policy. Ask your insurance company for the appropriate form.

➤ **Give to The Animal Haven Through a Foundation**

You can make a gift to The Community Foundation for Greater New Haven (or another foundation) that designates The Animal Haven as beneficiary. One way to do that is through a charitable gift annuity. This type of gift will provide an immediate tax deduction for a portion of your charitable contribution and generate income for you during your lifetime. The principal of the annuity will be distributed to The Animal Haven at the end of your life.

Another way is to create a designated fund at The Community Foundation, either now or through your estate, to provide an annual revenue stream to The Animal Haven in perpetuity.

The Community Foundation can help you with either of these methods. If you are interested in setting up such a fund, we can work with you and The Community Foundation to carry out your wishes.

With any estate planning gift that you make to The Animal Haven,

- you can direct that your gift be used where the need is greatest, which means that The Animal Haven can use it in any manner consistent with, and supportive of, its mission;
- you can direct that your gift be used for The Animal Haven's general operating funds, which are the funds needed to sustain its day-to-day operations;

- you can direct that your gift be used for a specific purpose; you should, however, contact us if you would like to restrict your bequest in this way to insure that we will be able to accommodate your wishes; or
- you can direct that your gift be added to The Animal Haven's Endowment, which is a permanent fund that provides annual support to The Animal Haven. The principal of the Endowment is retained by The Animal Haven in perpetuity, and the earnings on that principal are used to provide a regular stream of funds to the shelter each year. An Endowment helps to insure The Animal Haven's future.

However you choose to create a legacy benefiting The Animal Haven, please be sure to use our exact legal name, which is The Animal Haven, Inc., and our Employer Identification Number (EIN), which is 06-0735382.

If you would like more information, please contact The Animal Haven's President Linda Marino at linda@theanimalhavenct.org or 203-988-3836.

Thank you for your interest in supporting The Animal Haven. Regardless of which option you are considering, it is important that you discuss your plans with your attorney, financial advisor and/or tax advisor.

The material presented herein is intended as general educational information on the topics discussed and should not be interpreted as legal, financial or tax advice. Please seek the specific advice of your tax advisor, attorney and/or financial advisor to discuss the application of these topics to your individual situation.