

# Create your legacy of kindness.

Help Save Them All today and for generations to come.



Pebbles



**Best  
Friends**  
Save Them All®





# Your legacy of kindness

It's hard to say what it is about pets that leaves such a lasting mark on us. Perhaps it's their remarkable ability to love unconditionally, to forgive, to live life fully in the moment; or perhaps it's simply the way they prance about on walks or stealthily take over your bed at night.

Whatever it is, your pets have left a unique imprint on your heart, helping to shape what matters most to you today. That may mean wanting to reach out and help the many homeless pets waiting to experience the same joy you share with your pets.

Your love of all animals, forged by those deep bonds, has already helped create a better life for many homeless pets. **By making a gift to Best Friends Animal Society through your will, trust or another legacy plan, you can create an enduring gift to help Save Them All well into the future.**

## A FUTURE FULL OF KINDNESS

With simple planning now, your acts of kindness today will continue to make a difference for generations to come. By making a planned gift, you'll continue helping to create sweeping changes in the way America treats its homeless pets. Planned gifts offer you the opportunity to combine your charitable interest in Best Friends with estate planning options that often feature favorable financial and tax benefits.

These types of gifts may also allow you the opportunity to:

- Generate income now and into the future
- Reduce taxes
- Avoid capital gains taxes
- Preserve wealth for your family
- Honor a family member, friend or favorite pet by making a tribute gift







# Will or trust

By preparing your will or revocable trust now, you can enjoy peace of mind knowing that you have taken care of the people you love and the causes that are important to you.

Providing for the future of animals who need your help takes just a simple provision in your will or revocable trust. It's a very flexible plan that allows you to:

- Give a set dollar amount or a specific asset such as real estate or stock, donate a percentage of your estate or donate the remainder of your estate
- Put your gift to work immediately or, if you prefer, designate it to our endowment fund

We realize that circumstances change and your gift to us in your will may no longer be possible at some future date. That's why a gift in a will is suitable for so many people: **You can change your mind at any time.**

We want your legacy gift to be exactly what you want it to be. So check with your legal and financial advisors to ensure your plans benefit both the people you love and causes you care about in the most strategic way possible.

For your convenience, we have provided some suggested language below that you could use in your will or trust. Please feel free to adapt this language with your attorney to fit your individual situation. We have also included this language on a tear-out form in this booklet that you may give directly to your attorney.

## **Suggested language:**

*"I give to Best Friends Animal Society, a Utah corporation with its principal offices at 5001 Angel Canyon Road, Kanab, UT 84741, (the sum of \$\_\_\_\_\_) (all or \_\_\_\_\_ percent of my residual estate) to be used for its general purposes."*

*Best Friends Animal Society is a charitable organization located in Kanab, Utah, and exempt from federal taxation under Section 501(c)(3) of the Internal Revenue Code. Tax Identification Number: 23-7147797*







# Beneficiary of retirement or other financial account

One of the most flexible and inexpensive ways you can make a difference for the animals is by designating Best Friends as a beneficiary of your financial accounts. These can include:

- Retirement, IRA, 401(k) or 403(b) accounts
- Brokerage accounts
- CDs
- Money market, savings, checking or other accounts that allow transfer on death (TOD) or payment on death (POD) designations
- Health savings accounts
- Donor advised funds

Many people are surprised to learn that their pensions, retirement plans or other financial accounts can be a practical way to help Best Friends and can even be beneficial at tax time. You have a variety of options. Through a simple beneficiary designation form, you can add Best Friends as a beneficiary of 5, 10, 50 or even 100% — any amount you choose. Another approach is to name Best Friends as secondary or contingent beneficiary in case someone you're providing for can't claim his or her portion.

To name Best Friends on your beneficiary designation form, please use the following address: Best Friends Animal Society, 5001 Angel Canyon Road, Kanab, UT 84741. Tax identification number: 23-7147797. Relationship: 501(c)(3) Not For Profit Organization





Bailey



# Life insurance

**There are two ways that you can make a gift of life insurance to Best Friends.**

- You may name Best Friends as a full, partial or contingent beneficiary of any policy. (Don't forget employer-sponsored life insurance offered at no cost to you.)
- The second option is to donate outright a life insurance policy that is no longer needed. Best Friends would have the option of either holding or surrendering the policy to receive the current cash value. You may donate a policy that is paid up or one with ongoing premium payments.

You might even consider a new life insurance policy. With payments that are low (and perhaps even automatic), you can create a gift capable of doing much greater good in the future.

When you name Best Friends as owner of the policy, you may be eligible for tax savings. If you continue to make premium payments on a policy after donating it to Best Friends, those payments are tax deductible. Please note that Best Friends is not able to make premium payments from its own funds.

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







# Charitable gift annuity

A charitable gift annuity is a creative way to help you meet your financial and charitable goals. To set up a charitable gift annuity with Best Friends Animal Society, you may donate cash or appreciated securities. In return, you receive an income tax deduction and a steady stream of income for life for you or someone you designate. You may also save on capital gains taxes for gifts of appreciated securities.

When you establish a charitable gift annuity, you will not have to worry about a fluctuating stock market or an unpredictable economy because gift annuity rates are fixed, based on age. The payment you receive is based on the rate and the gift amount. You may choose immediate payments or you may defer payment for one or more years, resulting in even larger payments and income tax deduction. Additionally, a significant portion of your annuity payment is typically tax-free. After your lifetime, animals in need will get the full benefit of your generosity.

**Please note: There is a \$10,000 gift minimum. Beneficiaries must be 60 years of age to start receiving income.**

You might wish to consider other gift options, such as a charitable remainder or charitable lead trust, as an alternative to a charitable gift annuity. Contact the Best Friends planned giving department for a personalized illustration or talk to your financial or legal advisor.







# Outright gift

An outright gift is a popular way to share your generosity with the animals. It's simple and immediate, and you can find some really creative ways to help.

Donated shares of stock or mutual funds from publicly traded companies are a practical option and may provide additional tax benefits beyond what cash gifts provide.

- You can also donate jewelry or other valuable collections. Keep in mind, however, that some donated gifts require more planning. For example, you must adhere to strict regulations if you are donating real estate, cars, boats, stocks that are privately held or restricted shares. Please contact our staff before donating these items, and check with your legal and financial advisors about restrictions and regulations that apply.
- You can make a qualified charitable distribution (QCD) from your IRA. If you don't use some or all of your required minimum distributions from your retirement accounts, talk to your financial advisor about a qualified charitable distribution, which may reduce the income tax consequences of retirement account distributions.

If you choose to make a gift of personal property to Best Friends, please contact our planned giving department. One of our specialists will be happy to walk you through the process and discuss your options.







# Forever Friends

A Forever Friend is someone who has chosen to turn love for animals into a generous offering through a will, trust, insurance policy or other legacy gift that provides a future of kindness to animals.

The only thing needed to become a Forever Friend is to share with us that you have made a gift to Best Friends in your will, trust or other legacy plan. **Being a Forever Friend is voluntary and without obligation.** Please let us know so we can celebrate your commitment and legacy of kindness.

## FREQUENTLY ASKED QUESTIONS

### **Are there benefits to being a Forever Friend?**

The biggest benefit, of course, is that you'll be helping animals for generations to come. Forever Friends receive a lifetime subscription to *Best Friends* magazine, Forever Friends newsletters, invitations to special events, discounts on Best Friends lodging and a personal contact at Best Friends.

### **I already put Best Friends in my will. Do I need to do anything else?**

Yes, please complete a confidential Forever Friends membership form (included in this booklet) so that we can have a written record of your generosity. It's a nonbinding agreement strictly for our records that ensures you will become a Forever Friend.

### **What is Best Friends' address?**

Best Friends Animal Society  
5001 Angel Canyon Road  
Kanab, UT 84741

### **What is Best Friends' tax identification number?**

23-7147797

### **Why do you ask for so many details about my gift?**

We ask you to share as much detail as you're comfortable with so that we may thank you and honor your wishes.

### **How do I get in touch with a member of the Best Friends planned giving team?**

You can reach a member of our team by calling 435-359-9227 or emailing [plannedgiving@bestfriends.org](mailto:plannedgiving@bestfriends.org).







# Your legacy in action

The legacy you create now will help ensure that the difference you've made for so many homeless pets today can continue on for the homeless pets of tomorrow.

That's especially true if you choose to designate your gift for general use. Doing so means that the approximately 1,600 animals (many with special needs who rely on the Sanctuary for care on any given day) will feel your generosity. And so will multitudes of dogs and cats around the country who will be saved instead of dying in shelters.

Regardless of what gift option you choose to help animals in need, your donation can be designated for whatever purpose you choose. **This is your gift to the future, and we have the highest respect for your wishes.** To ensure that we can comply with your wishes, please contact the Best Friends planned giving department before executing legal documents containing a specific use for your gift.

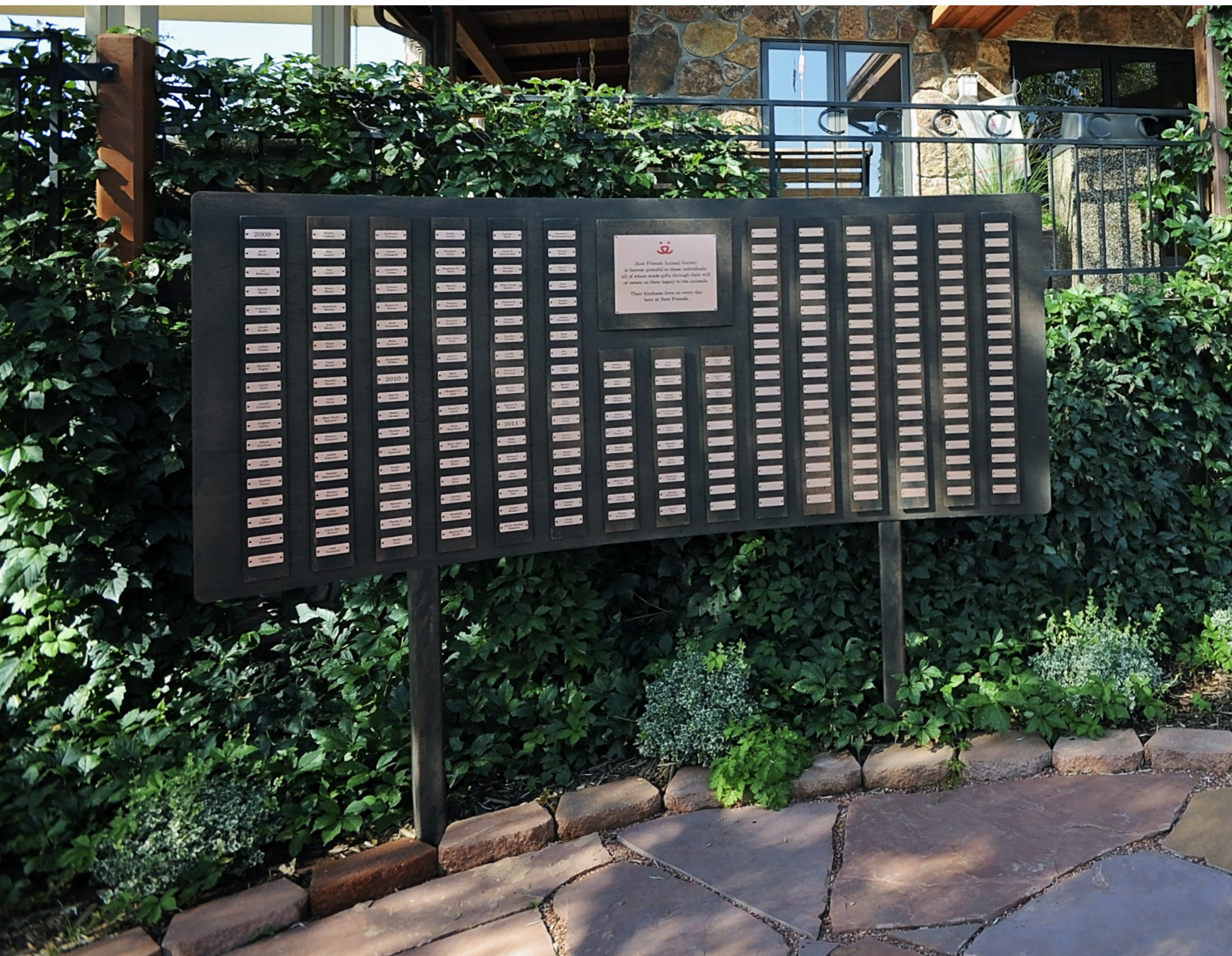
Thank you for your extraordinary commitment to the animals. Thank you, too, for your kind and generous heart and spirit.



# The legacy wall

Every generous gift to homeless pets through Best Friends does more than fill a food bowl, provide warm bedding, bandage a leg or find a home. It helps to shift our society toward one that will not accept the ongoing killing of homeless pets in shelters. **Your kindness today will help Save Them All now and into the future.**

In honor of such enduring commitments, Best Friends recognizes planned gifts of \$50,000 or more on the legacy memorial wall located near the welcome center at Best Friends Animal Sanctuary.





# The work of Best Friends

For more than 35 years, Best Friends has worked collaboratively with compassionate animal welfare partners and individuals like you to save the lives of homeless pets.

Best Friends' work spans the country, but its heart and headquarters are at Best Friends Animal Sanctuary, located in southern Utah. Here, state-of-the-art care serves as the model of compassion for pets in need in communities nationwide. On any given day, up to 1,600 dogs, cats, birds, horses, bunnies, pigs and other animals — many with special needs — call this beautiful red rock canyon their home-between-homes.

The work at the Sanctuary helped spark the nationwide no-kill movement and allowed the message of kindness toward homeless pets to take root in communities from coast to coast. As a result, we've made tremendous progress together. But there's still more to do because every day, more than 950 dogs and cats are killed in our nation's shelters simply because they don't have safe places to call home.

Whether we're building coalitions, empowering partner organizations to save more lives locally or implementing progressive programming such as newborn kitten care centers, regional lifesaving hubs, innovative adoption events and community cat programs, Best Friends is committed to doing whatever it takes to Save Them All.

## **Become a member**

With an annual gift of \$25 or more, you can become a member of Best Friends Animal Society. As a thank-you, members receive a subscription to the bimonthly magazine *Best Friends*, lodging discounts (including Best Friends Roadhouse and Mercantile), quarterly newsletters and more.

Visit [bestfriends.org/donate/become-member](https://bestfriends.org/donate/become-member) to learn more.



# About Best Friends Animal Society

Best Friends Animal Society is the leading animal welfare organization working to end the killing of dogs and cats in America's shelters by 2025. Founded in 1984, Best Friends is a pioneer in the no-kill movement and has helped reduce the number of animals killed in shelters from an estimated 17 million per year to well under a million. Best Friends runs lifesaving programs all across the country, as well as the nation's largest no-kill animal sanctuary. Working collaboratively with a network of thousands of animal welfare and shelter partners, and community members nationwide, Best Friends is working to Save Them All®. For more information, visit **bestfriends.org**.

*Note: Best Friends Animal Society does not provide legal, tax or financial advice. The information provided in this booklet is general in nature and is presented solely as educational information to illustrate charitable giving options and arrangements. You are encouraged to consult your own professional advisors to make certain a specific gift under consideration is compatible with your financial and charitable goals.*



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