

The Gift that Keeps On Giving

MAKE LOVE PART OF YOUR LEGACY



Fort Wayne Animal Care and Control
HELPING PEOPLE . HELPING ANIMALS



Leave a Loving Legacy

There is something special and wonderful about the warm gaze of a dog that trusts you completely or the full-body purring of a cat being petted. The connections we feel with our furry friends go beyond that of pet and owner. They are part of our families, they are our pillars of support and our constant comforts. They do not care what we are going through in life, what mistakes we make, what problems we have; they love us unconditionally.

Our pets leave paw prints on our hearts that never go away, no matter how much time passes. We create impacts on their lives as much as they impact our own, and we strive to make sure every animal feels the love and care of a family.

Your love and support of all animals, shaped by the bonds you have held with your own pets, has created a happy and loving future for many homeless and needy animals. **By making a gift to Fort Wayne Animal Care and Control through your will, trust, or another legacy plan, you can continue your generous efforts well into the future.**

Your Gift, Your Legacy

Whether you are a consistent donor or an occasional one, your love for animals and their health can continue on for future generations. By planning a gift for the future, you are helping to improve the welfare of animals in our care and assisting us in educating the community on pet care and safety. Planned gifts allow you to continue to show your support for Fort Wayne Animal Care and Control and they offer estate planning options that often have several financial and tax benefits.

Planned gifts allow you to:

- Honor a family member, friend, or favorite pet through a tribute gift
- Reduce taxes
- Avoid capital gains taxes
- Preserve wealth for your family

Will or Trust

The terms 'will' and 'trust' are often used when talking about our legacies. What will we give to future generations and leaving a lasting memory of our lives? When considering leaving a legacy of love for Fort Wayne Animal Care and Control, you will want to determine whether to include us in your will, or in a separate trust. We will discuss some of the differences and some options for you.

A **Will** goes into effect after someone passes on, and concerns any property that is in *their name only*. A will must also go through **probate**, which means a court must oversee the administration of the will to ensure it remains valid to the person's wishes.

A **Trust** can be used to distribute property at specific times, such as before passing, at passing, or after passing. This concerns only property that has been put in the name of the trust. A trust also does not go through probate, which can save time and money.

We understand that circumstances can 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 much more suitable for many people: **You can change your mind at any time.**

We want your legacy gift to do what you intend it to do, and we want you to benefit from the many personal advantages. Check in with your legal and financial advisors to find out how this plan can benefit both the animals and your estate.



Beneficiary of Retirement or Other Financial Account

Want a flexible and inexpensive way to make a difference for the animals of Fort Wayne? Consider making Fort Wayne Animal Care and Control 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

Your pension, retirement plan, or other financial accounts can be a practical way to help Fort Wayne Animal Care and Control and can be beneficial at tax time. There are a ton of options! By filling out a simple beneficiary designation form, you can have Fort Wayne Animal Care and Control be a beneficiary of 5, 10, 50, or even 100 percent of your account(s) - **any amount that you choose!** You could also name Fort Wayne Animal Care and Control as a secondary or contingent beneficiary. This means, Fort Wayne Animal Care and Control would become the primary beneficiary in case someone you're providing for can't claim their portion.

If you wish to name Fort Wayne Animal Care and Control on your beneficiary designation form, please use the following information:

Fort Wayne Animal Care and Control
3020 Hillegas Rd, Fort Wayne, IN 46808
Tax Identification number: 35-6001029
Relationship: City ordinance protected
Organization



Life Insurance

There are two ways that you can make a gift of life insurance to Fort Wayne Animal Care and Control:

- You may name Fort Wayne Animal Care and Control as a full, partial, or contingent beneficiary of any policy. (This includes employer-sponsored life insurance purchased at no cost to you.)
- You may donate outright a life insurance policy that is no longer needed. Fort Wayne Animal Care and Control would have the options 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.

If making a gift, you may even consider signing up for a new life insurance policy. With low and even automatic payments, you can give an everlasting and impacting gift.

When you name Fort Wayne Animal Care and Control as owner of the policy, you may be eligible for tax savings. If you continue to make premium payments on a life insurance policy after donating it, those payments are tax deductible. (Fort Wayne Animal Care and Control will not make premium payments from its own funds.)

Speak with 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 another way for you to meet your financial and charitable goals. To set up a charitable gift annuity with Fort Wayne Animal Care and Control, you may donate cash or appreciated securities. This allows you to receive income tax deductions 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 economy or stock market because gift annuity rates are fixed rates 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. A significant portion of your annuity payment is typically tax-free.

Reminder: There is a \$10,000 gift minimum. This gift is reserved for beneficiaries age 60 and older.

You may wish to consider other gift options, such as a charitable lead trust or charitable remainder. Talk to your financial or legal advisor about these options.



Outright Gift

A popular way to give a gift to the animals of our community is through an outright gift. This option is quick and simple, and there are some really creative ways to give.

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.

- 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.
- 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.



Your Legacy, Your Way

You are creating a legacy of love with your generous donations to Fort Wayne Animal Care and Control. Your love of animals and concern for their welfare will be measured in the impact that you create in their lives, ensuring that every animal has a chance at a full, happy, and healthy life.

If you choose to donate to Fort Wayne Animal Care and Control, you can choose to designate your gift to a specific animal care fund or for general use. Your gift will continue to aid us in our goals of providing assistance to any animal coming into our care, and reducing the number of pets being euthanized in shelters.

Regardless of which gift option you choose to help community animals in need, your donation can be used for whatever purpose you choose. **This is your gift and your legacy, and we have the highest respect for your wishes.** To ensure that we can comply with your wishes, please contact Fort Wayne Animal Care and Control before executing legal documents containing a specific use for your gift.

Thank you for your heartfelt commitment to the animals of our community.
Thank you, as well, for your generous and kind soul.



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About Fort Wayne Animal Care and Control

It is our mission to serve our community in a humane, public safety capacity while working to keep pets with loving families by providing education opportunities and resources or facilitating re-homing or adoption when necessary.

We are a full service law enforcement and public safety department serving people and animals within the City of Fort Wayne. Our shelter needs your help to protect and care for the over 9,000 homeless and neglected animals that we receive each year from our community. With your support, we can offer them the loving care they deserve. For more information, visit fwacc.org.

Note: Fort Wayne Animal Care and Control 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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