

Live well Leave well



CREATE A LEGACY

Planned gifts offer donors a chance to create a lasting legacy. Often referred to as legacy programs or societies, these gifts honor loved ones and enable individuals to make a meaningful tribute. By contributing this way, donors celebrate what matters to them while making a positive, enduring impact on their chosen causes. It's a wonderful way to give back!



TAX BENEFITS

Planned gifts come with valuable tax advantages that can really benefit you! For those with larger estates, bequests can significantly reduce tax burdens. While estates over \$11.7 million face federal taxes, any bequests, whether cash, real estate, vehicles, or stocks, are deducted from the estate's value. This thoughtful approach not only maximizes your legacy but also lightens the federal estate tax load for your loved ones. What a wonderful way to support them!



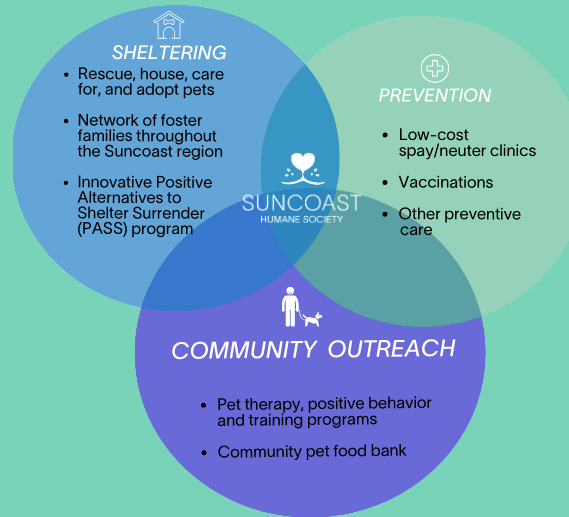
THE DECISION IS YOURS

Planned gifts provide donors with greater control over how their contributions are allocated compared to traditional annual gifts. Typically outlined in a legal document like a will, donors can specify exactly how their support impacts the organization, enhancing the connection with the causes they care about.

Suncoast Humane Society
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Englewood, FL 34224

Email: Development@humane.org

EIN: 23-7174193



SUNCOAST
HUMANE SOCIETY

INSPIRING TOMORROW: PLANNED GIVING FOR A LASTING LEGACY

Planned giving is a meaningful way to support Suncoast Humane Society. By including us in your plans, you can enhance the quality of lives for countless animals and strengthen our community's commitment to animal welfare.



Legacy Gifts

Legacy Gifts are made by including language in your will or living trust that leaves a portion of your estate to Suncoast Humane Society. They are generally revocable, which means you can change or modify them at any time with the help of your attorney, if you choose.

Specific Bequests (gifts) name a fixed dollar amount or percentage in your will or living trust as a gift to Suncoast Humane Society.

Residual Bequests (gifts) distribute the remaining balance after all your estate expenses and specific bequests are paid.

Restricted Bequests (gifts) ensure that your bequest will be used for a specific purpose in support of the work of Suncoast Humane Society.

You can enjoy great tax benefits by donating **appreciated stocks, bonds, or mutual funds**—it's an easy way to make a difference. Additionally, consider naming Suncoast Humane Society as a beneficiary of your **IRA, 401(k), or life insurance policy**. Just fill out a simple form, no attorney needed. It's a rewarding way to support a wonderful cause!

Donor Advised Funds

Wondering how your Donor Advised Fund (DAF) can make a difference? You've made a fantastic choice by contributing cash or appreciated stock, gaining a tax deduction, and now you're ready to recommend charity grants! If you're excited about maximizing your DAF's impact on the lives of animals and people in our community, let's explore the incredible possibilities together!

Remainder Trusts

Charitable Remainder Trust

If you've built a valuable investment portfolio but want to generate income without active management, consider a Charitable Remainder Trust (CRT). Selling your assets could lead to significant taxes, but a CRT allows you to support charitable causes while benefiting financially.

With a **Charitable Remainder Annuity Trust**, you receive fixed distributions based on the fair market value of your contributions multiplied by a set rate, offering you reliable income. In contrast, a **Charitable Remainder Unitrust** adjusts payouts annually based on asset performance, allowing your contributions and impact to grow over time. Both options reflect generosity and strategic planning, helping you create a lasting legacy. Whichever you choose, you'll be supporting meaningful causes like the Suncoast Humane Society.

Retained Life Estates

With Retained Life Estates, a donor transfers a property deed or title to a nonprofit while retaining the right to use the property. Retained Life Estates belong to the nonprofit after the set term is up. At that point, the nonprofit can sell or keep the property for its own use.

This brochure provides general information about charitable giving. This booklet is not intended to be legal advice. Please consult your financial advisor, tax professional or attorney for counsel on the best strategy for you.

GIFTS FOR ALL STAGES OF LIFE

Later Life

Reflecting on Lasting Impact (70's +)

Early Career

Building a Foundation (20's)

Retirement

Impact from Accumulated Wealth (60's)

Established Professional

Growing Impact (30's)

Peak Earning

Strategic Philanthropy (40's-50's)

Pre-Retirement

Legacy Planning (50's-60's)



"A SOCIETY GROWS GREAT WHEN OLD MEN PLANT TREES WHOSE SHADE THEY KNOW THEY SHALL NEVER SIT IN"
-GREEK PROVERB