



CREATING A LEGACY OF LOVE





A LONG-LASTING IMPACT

Animals have an innate ability to touch our lives in a deep, lasting way. Whether it was a childhood pet from long ago that you still remember fondly, or a current beloved companion animal who makes your days brighter, there is no denying that they can change our lives for the better. They teach us to be more patient, compassionate, and laugh with greater ease. The love between an animal and their person is like no other.

SPCA of Wake County knows well the companionship and joy animals can bring us and has dedicated more than 50 years to creating happy endings for homeless pets in our community. The same way we hope to create a lasting legacy for the pets and people of North Carolina, we believe you can make an enduring change as well. By making a gift to the SPCA of Wake County through your will, trust or another legacy plan, you can be a part of our life-changing legacy to better the lives of people and pets of our community...well into the future.

Through simple planning now, your compassionate gifts today will make a difference for pet-loving generations to come. Planned gifts help ensure SPCA Wake remains available to save the lives of pets in greatest need, support pet-loving families, and enrich and uplift communities. Making a planned gift offers you the opportunity to combine your charitable interest in SPCA Wake with estate planning options that often feature favorable financial and tax benefits.

Planned gifts may allow you the opportunity to reduce taxes, avoid capital gains taxes, honor a family member, friend or favorite pet through a tribute gift, and more. Most of all, a planned gift creates a personal legacy that takes your compassion for the animals who have bettered your own life and makes it possible for others in the future to experience the same.

The SPCA of Wake County is available to work with you to determine the smartest, easiest and most efficient ways for you to leave a legacy in support of the animals.



POPULAR GIFT OPTIONS

WILL OR TRUST

By preparing your will or revocable trust now, you can ensure peace of mind knowing you have taken care of those you love and the causes most important to you.

Providing for the future of animals in North Carolina can be accomplished through a simple provision in your will or revocable trust. You can give a set dollar amount or specific asset such as stock, donate a percentage of your estate, or donate the remainder of your estate to the SPCA of Wake County.

We understand that life circumstances may change and your estate gift to the SPCA may no longer be possible in the future. A gift from your will provides the reassurance and flexibility you need should your circumstances cause you to reconsider your planning.

Please check with your legal and financial advisors to discuss how a planned gift can benefit both the animals and your estate.

We have provided some suggested language below that you can use in your will or trust; please feel free to adapt this language with your attorney or advisor.

SUGGESTED LANGUAGE

I give to the SPCA of Wake County, Inc, located at 200 Petfinder Lane, Raleigh, NC, 27603, and federal tax identification number 56-0891732, ____% of my total estate (or \$____) , designated to support SPCA Wake priorities.



BENEFICIARY OF RETIREMENT OR OTHER FINANCIAL ACCOUNT

You may be looking for an inexpensive and flexible way to change the lives of animals in our community - designating the SPCA of Wake County as a beneficiary of your financial accounts is a popular way to do so. **Examples of this can include:**

- CDs
- Brokerage accounts
- Retirement, IRA, 401(k) or 403(b) accounts
- 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 an accessible and practical way to further the work of SPCA Wake, while still benefiting you at tax time. **A beneficiary designation form will allow you to add the SPCA of Wake County as a beneficiary of any percentage amount of your choosing.** Alternatively, you can name the SPCA as a secondary or contingent beneficiary in the event someone you're providing for is unable to claim their portion.

To name the SPCA of Wake County on your beneficiary designation form, please use the following information:

SPCA of Wake County, 200 Petfinder Lane Raleigh, NC 27603

Tax Identification number: 56-0891732

Relationship: 501(c)3 Non-Profit organization

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LIFE INSURANCE

You can give a gift of life insurance to the SPCA and ensure a legacy of compassion for the most vulnerable homeless pets in our community for years to come. You may name the SPCA as a full, partial or contingent beneficiary of any policy, including employer-sponsored plans.

Another option is to donate outright a life insurance policy that is no longer needed. SPCA of Wake County would have the option of either holding or surrendering the policy to receive its current cash value. Both a paid-for policy or one with ongoing premium payments are eligible for donation. Please ask your insurance provider for more details, or consult your legal or financial advisor to discuss which option is best for you.

Regardless of the type of policy you choose to benefit SPCA Wake, you can **rest assured knowing that your investment will go a long way** in making positive change for pets and the people who love them.

OUTRIGHT GIFT

An outright gift is a straightforward and popular way to share your generosity with the animals. Donated shares of stock or mutual funds from publicly traded companies are a practical option that may provide additional tax benefits beyond those of cash gifts.

If you don't use all of your required minimum distributions from your retirement accounts, speak with your financial advisor about a qualified charitable distribution, which may reduce the income tax consequences of retirement account distributions.

For additional information about an outright gift to the SPCA of Wake County, please contact our Development department. Our team will be happy to walk you through the process and discuss options.



ANIMAL LEGACY SOCIETY OF NORTH CAROLINA:

The Animal Legacy Society of North Carolina recognizes those who have chosen to carry forward their love for animals into a generous offering through their will, trust, insurance policy, or other legacy gift that provides a compassionate future for homeless pets in our community. By indicating your commitment to making a legacy gift, you will become one of a growing number of SPCA supporters who are creating a legacy in support of the animals.

We would be honored to welcome you as a member of the Animal Legacy Society of North Carolina. Gifts both large and small are important in preserving the work of SPCA Wake. Charitable legacy giving is for everyone - anyone who desires to leave a legacy of love for animals in need; one that will live on beyond their lifetime.

Designating SPCA Wake as a beneficiary in your estate plan makes you eligible for membership in the NC Animal Legacy Society. **By becoming a member, you will receive the following:**

- Annual Impact Report
- Quarterly SPCA Wake newsletters
- Monthly Brief from our President and CEO
- Opportunity to enroll in the SPCA Wake Peace of Mind Program

Please let us know so we may celebrate your compassionate commitment. The legacy you create now will help ensure the difference you have made for so many homeless pets will live on to support the pets in need of tomorrow.

Kristin Brown
Director of Donor Engagement
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919-532-2012



PEACE OF MIND PROGRAM:

As a member of the Animal Legacy Society of North Carolina, you have the option to enroll in our Peace of Mind pet guardianship program. In the event of your death, members of the Legacy Society can find reassurance in knowing the SPCA of Wake County will provide transitional care and find a permanent, loving home for your pets.

Most of us anticipate outliving our animal companions. **But what if your pets survive you? Our beloved animal companions have given us so much: unconditional love, joy, comfort, and unfailing friendship.** Preparing for their safety and security in the event of our absence is a difficult but important act in this lifelong friendship.

Regardless of whether your beloved companion is a dog, cat, or rabbit, the SPCA of Wake County can help you plan for their welfare should they outlive you. In North Carolina, as in most states, you cannot leave money directly to your pets. However, with SPCA's unique Peace of Mind Program, **you can make provisions for the care and adoption of your surviving pets** through your will or other estate documents.

By enrolling in the Peace of Mind program and making a planned gift to the SPCA you have our promise to receive, care for, and place into new homes your surviving pets. Your companion animals depend on you to meet their needs; if you are no longer able to do so, the SPCA can provide the comfort, care, and compassion all pets should receive.

If you are interested in our Peace of Mind program, we have provided a notification form for our Animal Legacy Society of North Carolina, as well as a pet bio form. Please visit spcawake.org/plannedgiving to download these forms. Please consult with your attorney and/or financial advisor prior to enrolling as this program is not a pet trust. The goal of the Peace of Mind program is to offer you the reassurance of rehoming your pet through adoption by finding them a suitable and loving home.

The suggested language (on the next page) can be modified to meet your specific needs or situation. It is extremely helpful to then provide a copy of whatever language is used to the SPCA of Wake County in order for us to review and to prepare for your pets if/when the situation arises.

Please forward any/all pertinent information to:

Planned Giving, SPCA of Wake County, 200 Petfinder Lane, Raleigh, NC 27603



PEACE OF MIND PROGRAM:

SAMPLE LANGUAGE

I wish to provide for the care and welfare of any and all pets that I own at the time of my death. It is my desire that they live the balance of their lives in a stable home environment. Accordingly, I give, devise, and bequeath my pets to my spouse. If my spouse does not survive me:

- A.** I give, devise, and bequeath my pets to The SPCA of Wake County, Inc., a nonprofit corporation (the "SPCA of Wake County") 200 Petfinder Lane, Raleigh, North Carolina, 27603, EIN 56-0891732, to be received by the SPCA of Wake County under the auspices of its Peace of Mind program.
- B.** In gratitude for caring for my pets, and to support the SPCA of Wake County's programs and services, I devise, and bequeath [insert description of bequest] to the SPCA of Wake County to be used for its general operations, or as so designated by its board of trustees.
- C.** I request that the SPCA of Wake County arrange for the permanent placement of my pets in a suitable home through the SPCA of Wake County's pet adoption program. I understand, however, that adoption may be precluded if a pet is seriously ill or injured, has a vicious temperament, or for any other reason would be a danger to an adopter or the public.
- D.** In any event, I request that my pets be cared for and treated as household pets and receive all reasonable care; provided, however, that, in the event of serious illness or injury, I do not desire that extraordinary means be used to prolong their lives; and provided further that the SPCA of Wake County may euthanize any pet determined by the SPCA of Wake County, in its sole and absolute discretion, to be seriously ill or injured, to have a vicious temperament, or to be a danger to an adopter or the public for any other reason.

Please note: you must notify the SPCA of Wake County upon enrolling in this program so that we may have your information and your pet's information on file.

The above language is a sample for informational purposes only, and should not be considered legal, accounting or tax advice. Please consult with your attorney, financial advisor and/or accountant.