

Legacy Leaders

Your Guide to Planned Giving



Including SafeHaven Humane Society in your final giving plans allows you to enjoy the benefits of a gift to charity while making a powerful statement about your love for animals.

Remembering SafeHaven in your will, trust or other estate plans ensures our ability to help thousands of animals annually through our low-cost, high quality programs and rescues. These thoughtful gifts influence others to remember SafeHaven as well.

Legacy Leaders members have many ways to give to SafeHaven Humane Society:

- ◆ **Naming SafeHaven in a will or living trust.**
- ◆ **Making a gift of cash or appreciated securities to establish a charitable gift annuity.**
- ◆ **Creating a charitable remainder trust (CRT) which provides you with income for the term of the trust.**
- ◆ **Naming SafeHaven as the beneficiary of a paid life insurance policy or individual retirement account (IRA).**

The legal name of our organization is SafeHaven Humane Society. We are a 501(c)3 Oregon nonprofit and our federal tax ID number is 93-067-6661.

Once you've completed your final giving plans, let us know by completing a Statement of Testamentary Provision, available at [**www.safehavenhumane.org/support-us/donate/legacy-leaders**](http://www.safehavenhumane.org/support-us/donate/legacy-leaders).

If you've already included SafeHaven in your final giving plans, please let us know so we may thank and recognize you as a Legacy Leader member.

SafeHaven has a special way to thank donors while they are living. Legacy Leaders is our way of recognizing those whose planned gifts ensure a healthy financial future for us and the homeless animals in our care. Benefits of membership include recognition on the SafeHaven Legacy Leaders wall located in the shelter and eligibility to enroll your pets at no cost in our Friends for Life program. Pets enrolled in Continuing Care are placed with new families, should their pet parent precede them in death.



LEAVE A LEGACY OF COMPASSION AND KINDNESS FOR THE ANIMALS

BEQUESTS

The simplest planned gift is a bequest to SafeHaven Humane Society in your will, which can be in the form of cash, securities, real estate or other types of property. Bequests can be for a specific amount or percentage of your estate and they can be unrestricted or directed to a specific program or service here at SafeHaven Humane Society.

GIFTS OF LIFE INSURANCE

You may designate SafeHaven Humane Society as the sole beneficiary, or one of several beneficiaries, of a life insurance policy. Paid-up policies are the most effective gifts in that neither the donor nor SafeHaven Humane Society has any responsibility for making future premium payments.

RETIREMENT PLAN ASSETS

SafeHaven Humane Society can be named as the beneficiary of most pension, profit-sharing, 401K, IRA, and other retirement plan accounts. Due to the complexity of these plans, please consult your plan administrator, attorney, and/or tax adviser before you designate a charitable beneficiary for retirement plan assets.

GIFT OF RETAINED LIFE INTEREST

Often a donor would like to donate real estate but wishes to continue living on the property. The donor would transfer the property to SafeHaven Humane Society subject to a retained life estate and the donor would receive a charitable deduction determined by the donor's life expectancy.

CHARITABLE REMAINDER TRUSTS

Trusts make payments to a donor for a period of years or for the beneficiary's lifetime. At the end of the specified period or the beneficiary's life, the funds remaining in the trust are paid to SafeHaven Humane Society.

CHARITABLE LEADS TRUST

These trusts provide the charitable beneficiary with immediate income for a specific period, after which the trust reverts to the donor or another charitable beneficiary. SafeHaven Humane Society will not receive the trust principal. These trusts may be effective for donors who have a high current income but who will need income from the trust's assets at some time in the future, such as after retirement or when other sources of cash flow are no longer available.

CHARITABLE GIFT ANNUITIES

A charitable gift annuity is a contract that pays the donor or the donor's designated beneficiary a fixed periodic amount for life. The donor contributes a sum of money to fund the annuity, and the payments are based on the age of the recipient. A portion of each payment is income and the remainder is a return of the principal contributed. Only a portion of the payment is taxable to the recipient. The donor's income tax charitable deduction is based on the life expectancy of the recipient.

Contact our planned giving team at 541-928-2789, email Katie at katies@safehavenhumane.com or visit www.safehavenhumane.org/support-us/donate/legacy-leaders to request more information and learn how your gift will help save lives.

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STATEMENT OF TESTAMENTARY PROVISION

Name (as you would like to be recognized and have it published)

As a member of the SafeHaven Humane Society Legacy Leaders, your name(s) will be listed on our donor wall in the shelter (unless you request no listing).

☐ Do recognize on the donor wall or in SafeHaven publications, with the hope that I/we may inspire others to give.

☐ Do not recognize or publish. I/we choose to be anonymous Legacy Leaders member(s)

In order to properly reference SafeHaven in your planning documents, the legal name of our organization is SafeHaven Humane Society. We are a 501(c)3 Oregon nonprofit organization, our federal tax ID number is 93-067-6661 and our legal address is 32220 Old Hwy 34, Tangent, OR 97389.

To assist SafeHaven in record keeping and future budget planning, please answer the questions below. Please note that this information is for planning purposes only and is not legally binding.

DESCRIPTION

General description of type of provision (will, revocable trust, retirement account, other – please describe):

Definition of provision (percentage of total estate, specific dollar amount, other – please describe):

Name and contact information of attorney or trust administrator, if applicable:

With the understanding that values are subject to change and my/our plan is subject to change, I/we anticipate my/our future gift to SafeHaven to be valued at approximately: _____

PURPOSE

☐ This gift is unrestricted and may be used where the need is greatest at the time.

☐ The gift is to be used for the following purpose: _____

CONTINUING CARE

As an exclusive benefit of membership in the Legacy Circle, please indicate your interest in our *Friends for Life* program. Pets enrolled in *Friends for Life* are placed with new families carefully selected by our team.

☐ Yes, please include me in the Friends for Life program!

Signatures: _____

Date: _____

Telephone: _____ Email: _____

FreeWill



SafeHaven is now partnered with FreeWill, an online resource created to make creating your will easy!



FreeWill lets you make your last will and testament quick, easy, and completely free.

As a thank you for being a friend of SafeHaven Humane Society, FreeWill is delighted to help you create your legal will. It's 100% free to you, and most people finish in 20 minutes or less. We also offer you the ability to create a free revocable living trust.

Options include bequests, retirement accounts, life insurance and more! Learn more at **www.safehavenhumane.org/support-us/donate/legacy-leaders**.