



MORRIS
ANIMAL
REFUGE

Planned Giving Handbook

Leave a lasting legacy for pets in need.

Since 1874 Morris Animal Refuge and our supporters have been saving the lives of animals in need in the Philadelphia area. By making a gift to Morris Animal Refuge through your will, trust, or other financial plan, you'll become a part of the rich history of Morris, save the lives of animals today and ensure that we are able to help the animals of tomorrow.

And the benefits to you and your loved ones are hardly insignificant. Planned gifts can reduce income tax and offer substantial tax savings on appreciated properties and securities.

Planned giving is a win for everyone — the animals, your family and you!

Making a planned gift? Please let us know so we can provide the proper acknowledgment.

Lewis Checchia

Executive Director

lchecchia@morrisanimalrefuge.org

484.716.1444

Ready to make a gift?

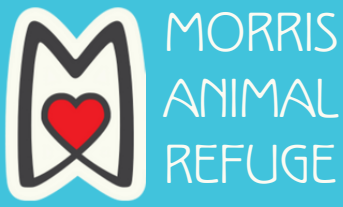
By making a gift to Morris Animal Refuge through your will, trust or another legacy plan, you can create a lasting legacy with our historic, lifesaving organization.

If you have questions, please contact our Executive Director, Lewis Checchia, at lchecchia@morrisanimalrefuge.org or 484.716.1444.

Morris Animal Refuge is a 501(c)(3) registered nonprofit (Tax ID# 23-1352237) and we have sample bequest language available if needed:

“ I give to Morris Animal Refuge, a Philadelphia animal shelter located at 1242 Lombard Street, Philadelphia, PA 19147, (the sum of \$ ____) (all or ____ % of my residual estate) to be used for its general purposes. ”

Morris Animal Refuge, 1242 Lombard Street, Philadelphia, PA 19147 | EIN 23-1352237



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Popular Giving Options

Will of Trust

Making a gift to Morris Animal Refuge through your will or revocable living trust is a simple and flexible way to save the lives of homeless pets for years to come. Have you already named Morris in your will or trust? Please let us know your plans. We'd like to thank you for joining us in our lifesaving work.

There are several ways you can make a gift through your will or trust:

Specific Gift:

You describe exactly what kind of gift you want to leave to a specific individual or organization and the designated source. If you want to leave a specific dollar amount from a specific source or a particular item, this is the type of bequest you would use.

Residuary Gift:

This type of bequest is honored after all other bequests have been made, and all debts, expenses and taxes have been paid.

Contingent Gift:

This type of bequest is fulfilled if certain conditions are met. For instance, if your primary beneficiary does not survive you, you can indicate your next choice through a contingent bequest.

IRA Charitable Rollover

If you make a contribution to Morris Animal Refuge through your individual retirement account (IRA), you'll be saving the lives of homeless pets and you'll get great benefits, too!

A charitable IRA rollover is a wonderful option for people 70½ and older because it allows you to make a gift to the animals - from \$100 to \$100,000 - and the distribution won't count as taxable income. A charitable IRA rollover is a direct contribution made from your traditional or Roth IRA to a public charity like Morris. Your contribution is excluded from your taxable income and can't exceed \$100,000 per year.

Every gift, no matter how large or small, helps save the lives of homeless pets. When you make a contribution to Morris Animal Refuge from your IRA, you'll be supporting our historic, lifesaving mission.

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Popular Giving Options

Financial Accounts and Retirement Assets

A gift of your retirement assets, such as a gift from your IRA, 401(k), 403(b), pension or other tax-deferred plans, is an excellent way to make a planned gift to Morris Animal Refuge. If you are like most people, you probably will not use all of your retirement assets during your lifetime. Why not allocate the remainder to philanthropic giving that will leave a lasting legacy for pets in need?

Typically, retirement plan balances are subject to both income and estate taxes. Because Morris is a nonprofit organization, we won't pay income tax on the distribution nor will the gift be subject to estate tax. Your retirement assets may be transferred to Morris Animal Refuge by completing a beneficiary designation form provided by your plan custodian.

Life Insurance

You can name Morris Animal Refuge as a primary life insurance beneficiary or as a contingent beneficiary should your other beneficiaries not survive you. After your lifetime, the benefits from your policy pass to Morris Animal Refuge, free of federal estate tax. To make this gift, simply contact your insurance carrier and request a beneficiary form. Here are some benefits to you:

- **Simple to give:** Involves little effort or paperwork
- **Financial advantage:** Continued ownership of your policy
- **Flexibility:** You can change your mind and your beneficiaries at any time
- **Future tax savings:** Removes the asset from your potential gross taxable estate
- **Legacy of kindness:** Your gift will help Morris continue our lifesaving work

Another option is to donate your paid-up life insurance policy to Morris Animal Refuge. If the policy has a cash value, Morris would have the option of either holding the policy until the maturity date or surrendering the policy to receive the policy's current cash value. Here are some benefits to you:

- **Income tax savings:** You're entitled to a current income tax deduction
- **Future tax savings:** Removes the asset from your potential gross taxable estate
- **Legacy of kindness:** Your gift will help Morris continue our lifesaving work