

What are the Ways of Planned Giving?

Most Popular

Bequest – Just takes a simple designation in your will or trust and costs nothing during your lifetime.

Living Trust – Avoids probate. Just name Animal Services as your beneficiary.

Increase Your Cash Flow

Gift Annuity – A simple agreement that can increase your cash flow from a gift that provides guaranteed fixed payment for life.

Cheapest Source of Cash

Life Insurance – Donate your policy and deduct future premium payments, or just name Animal Services as policy beneficiary.

Most Popular with Financial Advisors

Charitable Remainder Trust – Great tool for selling assets tax-free and receiving income for life; the remaining assets go to Animal Services.

Most Expensive for Your Children

Retirement Assets – Retirement funds paid to your kids at your passing can get hit with income and estate taxes or 70 percent or more, but are tax-free to Animal Services.

Greatly Reduce Estate Tax

Charitable Lead Trust – Greatly reduce or avoid estate tax on trust assets passing to family ... if some trust income goes to Animal Services for a few years.

Most Possibilities

Family Business Stock – When the time comes to transfer or sell the family business, there are tax and practical reasons for including Animal Services in the plan.

Deduct Now and Transfer Later

Donor Advised Fund – Works like a “charitable bank account” – claim deduction now and decide later when Animal Services will receive the funds.

Private Foundation – Lets you are your family invest and control your charitable dollars.

Big Potential for Inspiring Other Donors

“Lifetime Bequest” (Gift now + Pledge estate) – Secures a current gift and increases the potential for an even larger estate gift. A long-term pledge binding your estate can leverage donor recognition for these linked gifts.

About Animal Services...

The Shelter is located at 3120 Martin Way, just west of Ensign Road (the emergency entrance to St. Peter's Hospital). The Shelter has been serving the community since 1968 and moved to its current location in February 1999. The Shelter houses approximately 8,500 animals each year.



MISSION STATEMENT

Joint Animal Services promotes responsible pet ownership for the health and safety of people and animals; reduces pet overpopulation through education, licensing and altering pets; reduces animal suffering through proper medical care and humane euthanasia; provides temporary shelter for strays and owner-released animals; and provides opportunity for pet adoption.

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Planning Gifts for the Future



Animal Services

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Why Planned Giving?

Not everyone has the money to tuck into a donation jar or to purchase bags of dog or cat food for donation. But anyone, regardless of income, can plan a gift that provides a significant resource for animals.

Planned gifts provide creative and flexible strategies for your charitable and estate planning. Some planned gifts provide you with income. Many of them can reduce your taxes. And the greatest benefit is supporting the work at Animal Services.

Although Animal Services receives operating funds from the communities we serve - Lacey, Olympia, Tumwater and Thurston County - we depend on donations and planned gifts to supplement those funds and, in some cases, to keep programs running.

Animals Services has tax-exempt status under Section 170(c)(1) of the Internal Revenue Code. The tax-exempt status permits donors to claim a charitable deduction for their contributions.



We have the good fortune of living and working in a community that cares about animals and whose

community members have always been willing to help, even in an economy that spares little for sharing.

Here are some ideas for developing a planned gift to fit with your income and estate needs. Financial advisors, insurance agents, CPAs or attorneys can help you develop your plan.

Planned Giving at a Glance

	TYPE OF GIFT	ADVANTAGES	BENEFICIARY
Gifts that Pay You Income	Charitable Gift Annuity	<ul style="list-style-type: none"> • Current income tax deduction • Portion of payments may be tax free • Fixed and predictable payments 	<ul style="list-style-type: none"> • One or two beneficiaries • Animal Services is the future beneficiary
	Charitable Remainder Trust	<ul style="list-style-type: none"> • Current income tax deduction • No capital gain recognition on appreciated assets • Diversification of investments • Payments for life or term of years 	<ul style="list-style-type: none"> • One or more beneficiaries • Animal Services is the future beneficiary
	Pooled Income Fund	<ul style="list-style-type: none"> • Current income tax deduction • Income stream • Diversification of investments • Can be funded with smaller gifts 	<ul style="list-style-type: none"> • One or more beneficiaries • Animal Services is the future beneficiary
Gifts Animal Services Can Use Today	<ul style="list-style-type: none"> • Outright • Tangible Personal Property • Bargain Sale 	<ul style="list-style-type: none"> • Current income tax deduction • See your gift in operation during your lifetime 	<ul style="list-style-type: none"> • Animal Services is the immediate beneficiary
	Charitable Lead Trust	<ul style="list-style-type: none"> • Potential gift tax savings on transfer of assets to individual beneficiaries 	<ul style="list-style-type: none"> • Animal Services is the immediate beneficiary • You or your heirs are future beneficiaries
Gifts that Take Effect at Death	Bequest	<ul style="list-style-type: none"> • Charitable deduction for taxable estates • Allows you to make a large gift at no immediate cost to you 	<ul style="list-style-type: none"> • Animal Services is future beneficiary
	Life Insurance	<ul style="list-style-type: none"> • Allows you to make a large gift at little cost to you 	<ul style="list-style-type: none"> • Animal Services is future beneficiary
	Retirement Plans	<ul style="list-style-type: none"> • Avoids double tax of assets • Animal Services applies the full amount of plan assets to the purpose you chose 	<ul style="list-style-type: none"> • Animal Services is future beneficiary
	Retained Life Estate	<ul style="list-style-type: none"> • Current income tax deduction • Estate tax saving • Continued use of property for life 	<ul style="list-style-type: none"> • You retain lifetime beneficial use of property • Animal Services is the future beneficiary