

PLANNED GIVING OPTIONS & BENEFITS

BEQUEST

- Retain control during your lifetime
- May reduce or eliminate Federal Estate Tax
- May be for a specific amount, a percentage or residual amount
- No immediate tax deductions

PET TRUST

- Can be used to establish a gift plan for your pets
- May be for a specific amount or a percentage of your estate

RETIREMENT ASSETS

- All or a percentage may be left to charity
- Possible estate tax savings; bypasses income tax to heirs
- See the benefits of your gift during your lifetime!

CHARITABLE REMAINDER TRUST OR CHARITABLE GIFT ANNUITY

- Income stream for your life or a term of years, and an income tax deduction
- May provide variable or fixed income
- Avoid capital gains tax on appreciated assets
- See the benefits of your gift during your lifetime!

CHARITABLE LEAD TRUST OR DONOR ADVISED FUNDS

- Reduce or eliminate transfer tax; receive gift and estate tax deductions
- Provide an income stream to the charity for a period of time
- Assets at the end of the time period are transferred to your heirs
- See the benefits of your gift during your lifetime!

INSURANCE POLICY

- Name Charleston Animal Society as a beneficiary of your policy
- No up-front major gifts during your lifetime
- May avoid familial turmoil or distress

*Always consult your personal attorney or advisor for personalized advice.
Charleston Animal Society does not provide legal advice.*

For more information, please contact
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