

Petey on AVHS's couch with a volunteer

Leaving a gift bequest in your will

If you could leave one gift for your community, what would it be? Have you considered a gift through your will? A Charitable Bequest to Ark-Valley Humane Society is one of the simplest ways to profoundly support the future of animal welfare in Chaffee County, Colorado, and the perfect legacy of your love of animals.

Why consider a bequest to Ark-Valley Humane Society?

As a humane society our mission is to ensure the welfare of companion animals with compassion and care. Your gift will strengthen our ability to build a community that gives animals the shelter, veterinary care, and loving homes they need. By naming Ark-Valley Humane Society in your will or living trust, you will help continue our local work far into the future.

How it works

- 1. Work with a professional financial advisor or attorney to include a bequest in your will or living trust that states you want to provide a future gift to Ark-Valley Humane Society.
- 2. Ark-Valley Humane Society will receive the gift after your death and apply it to the purpose(s) you specified.

Benefits of a Bequest to Ark-Valley Humane Society

- Your assets remain in your control during your lifetime; bequests do not reduce your current assets.
- Family comes first. You can support animals in need through a bequest after providing for your family.
- You may direct your bequest to a particular purpose.
- A bequest to Ark-Valley Humane Society may decrease the size of your estate and reduce your estate taxes. Your attorney, accountant or financial planner can advise you.
- You can modify your bequest during your life if your circumstances change.
- You know that your gift will benefit Ark-Valley Humane Society in the future just as you intend it to.





Alan in AVHS's Adoptable Cat Room with a volunteer

Endorsement Statement

One of our legacy society member has this to say...

I love animals, and high on my priority list is concern for their care and welfare. I live in Buena Vista and have volunteered for the Ark-Valley Humane Society in a number of ways, allowing me to see all they do for companion animals and our community. AVHS is a fiscally sound, responsible organization with a caring and compassionate staff. They have become family, and I hope my legacy donation helps them continue to thrive. - Judy H.

Types of Bequests

Making a charitable bequest is a very personal choice. There are a number of options for instructing your family and friends on what to do with the assets that you have accumulated in this life. You might consider the following examples when making a bequest to Ark-Valley Humane Society:

Outright Bequests

Give a specific amount, asset or estate percentage.

Residuary Bequest

Give a percentage or 100% of "my residual estate" after taking care of all other gifts and taxes.

Contingent Bequest

Plan a contingency such as "a specific dollar amount or a percentage of my residual estate goes to Ark-Valley Humane Society if I should outlive my spouse or partner."

· Retirement Fund Gift

Name Ark-Valley Humane Society as a beneficiary of your IRA, retirement and/or profit sharing plan.

Insurance

Name Ark-Valley Humane Society as a beneficiary of your life insurance policy.

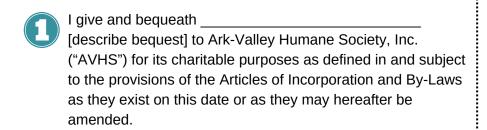
The best way to begin this discussion is to talk with Ark-Valley Humane Society and your professional advisor.

Contact

Nikki Ritter | 719-395-2737 | executivedirector@ark-valley.org



Sample language for a BEQUEST to Ark-Valley Humane Society



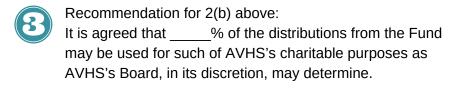
To indicate purpose and name of the fund, choose (a) or (b)

(a) Unrestricted: "This bequest shall be used to create a component fund to be known as the

______Fund. This Fund shall be used for such of AVHS's charitable purposes as AVHS's Board may from time to time determine."

(b) Field of Interest: "This bequest shall be used to create a component fund to be known as the

______Fund. It is my/our desire that distributions from this Fund be used for the support of ______ [name particular charitable area of interest, i.e. spay/neuter, veterinary care, capital improvements, dogs,



Another consideration/option:

cats, etc]."

When leaving a bequest to Ark-Valley Humane Society, keep language in the will as general as possible – perhaps just naming the Fund – and indicate that additional details pertaining to the charitable purpose are contained in a letter of understanding on file with Ark-Valley Humane Society. That way, the letter of understanding can be updated at any time without re-writing the will.



Emma in AVHS Cat Meet N Greet Room Describe bequest:

Options include naming AVHS to receive a percentage of the estate, a. specific dollar amount, or the remainder of the estate after other beneficiaries and expenses have been paid.

Choose a or b and name the fund:

The NAME of the fund will sometimes appear in AVHS printed materials and/or on its Website.

If 2(b) is chosen:

It is strongly recommended that donors permit AVHS's Board to allocate 25% or more of the Fund's annual distributions to programs selected by the Board. This enables the Board to respond to the community's most pressing needs from year to year.

AVHS EIN Tax ID #84-116-1648



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