

# Your support is a gift of life and hope for homeless and abandoned dogs and cats.

*Your generosity is essential to bettering their lives.*



## Planned Giving

"Planned giving" is an all-inclusive term used to describe the many types of gifts an individual may use to continue supporting the mission of the Cedar Bend Humane Society. Some of these options include:

### Outright Gifts

Outright gifts are often considered the most desirable type of planned gift as funds may be used immediately.

## Bequests

Gifts granted through your will or trust at the time of your death. The gift may be a set dollar amount or a specific itemized property such as stocks, bonds, land, equipment, etc.

Some individuals leave a residual gift, which is a bequest of their estate (or percentage of the estate) that remains after all debts and other obligations are paid.

## Life Insurance / Annuities / IRA's / 401K's / Trusts

Please be sure to consult your attorney and/or your financial advisor about which type of gift is the best to maximize your tax benefit.

## Life Insurance Policies

There are two ways to do this. Name the shelter as the beneficiary of a life insurance policy on which you pay premiums, with the proceeds payable upon your death. The second way is to buy an insurance policy naming the shelter as the beneficiary and make a gift of the policy itself. By donating the policy, an immediate income tax deduction is available to you. In addition, if you continue to pay premiums on our behalf, the premium payments are also deductible.

## Charitable Remainder Trusts

Trusts are typically used when your gift is \$50,000 or more. The body of the trust becomes available to the Cedar Bend Humane Society upon your death.

Please contact Co-Directors, Karla Beckman or Kristy Gardner at the Cedar Bend Humane Society 319-232-6887 to let them know when you have made plans for any such gifts. We would love the opportunity to thank you for your generous act. We are happy to honor your wishes regarding anonymity.

## Retained Life Estate Agreements

Retained Life Estate Agreements may be used to give property to the shelter while you retain the right to use the property for the remainder of your lifetime.

## Charitable Gift Annuities

Charitable Gift Annuities involve a transfer of money or securities in exchange for the shelter's agreement to pay you a guaranteed fixed income for life. They may also be set up to pay through the lifetime of a second person, such as a spouse or child. The amount of income received depends on the age when the annuity begins. Your tax professional can advise you on how to maximize your tax advantage with this method of giving.



There are many types of planned giving arrangements, which ever one you choose, you always have the option of directing how the funds will be used.

**Unrestricted gift** may be used for the immediate needs of the shelter and animals or it may be set aside for the use toward a larger, future project.

**Restricted gift** may be made for a specific purpose that you designate. Some examples include veterinary care for injured animals, the spay/neuter program, human education, or facilities maintenance and improvement.



Please be sure to consult your attorney and/or your financial advisor about which type of gift is the best to maximize your tax benefit.

It is also important that you clearly identify the Cedar Bend Humane Society as the recipient of your gift. The easiest way to do this is to include our Federal Employer Identification Number (FEIN) on any written materials. The number is 42-0843378. This number identifies the Cedar Bend Humane Society as your intended beneficiary. If you have additional questions about planned giving, please contact the shelter at 319-232-6887

Thank you for your friendship and support!



### **The Mission of the Cedar Bend Humane Society**

P.E.T.S.

Place. Educate. Teach. Shelter. CBHS is passionate to: Place animals in lifelong, loving homes. Educate on the issues of humane care. Teach responsible pet ownership. Shelter the stray, neglected and unwanted.



CEDAR BEND HUMANE SOCIETY

#### **Business Hours:**

#### **Cedar Bend Humane Society Adoption Center**

Tuesday - Sunday 10:00 a.m. - 5:00 p.m.  
Closed Mondays.

#### **Animal Intake Center**

Sunday - Saturday 8:00 a.m. - 5:00 p.m.

319-232-6887

1166 West Airline Hwy.

Waterloo, IA 50703

[www.CedarBendHumane.org](http://www.CedarBendHumane.org)

## ***Memorial & Planned Giving***



***Leave a legacy  
to provide for the  
animals of tomorrow.***

***Planned giving to the  
Cedar Bend Humane Society.***

