



You Are Invited...

Placer SPCA Estate Planning Workshop

Tuesday, July 20
12:00 p.m.
At Placer SPCA
A Light Lunch will be Provided

Presented by
Colin S. Grahl
Certified Financial Planner®
Co-chair – Placer SPCA Planned
Giving Committee
www.colingrahl.com

Learn how Charitable Planned Giving can help you
realize your personal goals.

Topics Will Include

- Do I need a will, trust or estate plan?
- How can I do the most good for those in need *and* realize my personal goals?
- Preparing for upcoming changes in tax laws
- How planned giving tools can provide more for your heirs and tax benefits for you



**Please RSVP to Susan Willson,
Development Director, at the contact information listed below.**

This workshop is for educational purposes only.
You will not be solicited to purchase services and your contact information will not be shared.

Placer County's Companion Animal Welfare Experts – Where Your Donations Stay Local

916.782.7722 or 530.885.7387, Ext. 102
funddevelopment@placerspca.org

150 Corporation Yard Road
Roseville, CA 95678
Fax: 916.782.8655

www.placerspca.org

Join our *Circle of Hope* Legacy Society!

By choosing to include the Placer SPCA in your estate planning, you are helping to ensure that the Placer SPCA can continue helping thousands of abandoned, stray and abused animals throughout Placer County. Your gift will make the future a better place for the animals with which we share our lives.

Circle of Hope Legacy Society members are those who have informed the Placer SPCA that they have included us in their Charitable Planned Giving. The Circle of Hope offers special benefits and privileges as our way of saying **thank you** today for your future gift.



For more information about the Circle of Hope, attend an Estate Planning Workshop or contact the Development Department at (916) 782-7722, ext. 102 or (530) 885-7387, ext. 102, or at funddevelopment@placerspca.org.

Planned Giving Options

Please see detailed handouts for more information

♥ Including the Placer SPCA In Your Will, Trust, or Estate

If your goal is to defer a gift until after your lifetime, make this your gift...By making a bequest in your Will, your donation will be exempt from federal estate taxes.

♥ Charitable Gift Annuity

If your goal is to supplement your income with fixed annual payments make this your gift...With a charitable gift annuity, you enter into a contract with the Placer SPCA and receive fixed annual payments while realizing current and future tax savings.

♥ Giving Through Life Insurance

If your goal is to make a large gift with minimal cost to yourself make this your gift...With a life insurance gift, you give a policy, making the Placer SPCA the owner and beneficiary, and taking a current income tax deduction.

♥ Gifts of Appreciated Stock

If your goal is to make an immediate gift and maximize your tax benefit, make this your gift...With a gift of appreciated stock, your tax benefit is generally the fair market value of the stock at the time of your gift.

Other Giving Options

♥ Revocable Gift in a Living Trust

If your goal is to make a revocable gift during your lifetime, make this your gift...By creating a living trust, you name the Placer SPCA as the beneficiary of your assets while keeping control of your trust during your lifetime.

♥ Retirement Plan Gift

If your goal is to avoid the double taxation on retirement plan assets, make this your gift...With a retirement plan gift, you name the Placer SPCA as the beneficiary of the remainder of assets after your lifetime, avoiding heavily-taxed gifts to your heirs.

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