



## ESTATE PLANNING & CHARITABLE GIVING Including the Placer SPCA In Your Will, Trust, or Estate

**Your will or trust is just one part of your total estate plan, but it is the most important part.** If you die without a will or trust, your good intentions die with you. The state decides for you who shall benefit from the estate you have built over your lifetime. With a will or trust, you can provide for the ones you love; you can make provision for a favorite relative or friend. With a will or trust you can also make a charitable donation to causes that are important to you and minimize taxes and other expenses.

If you have life insurance, own a home, stocks or other property, you will need a will or trust. Please contact an estate planning professional to help you achieve your goals.

There are many ways to name the Placer SPCA in your will. You may choose to give specific assets, a portion of your estate or what is left from your estate after other payments. Below are some sample wordings for bequests.

### Residual (after other bequests or designations are named)

"I give to Placer County Society for the Prevention of Cruelty to Animals (tax ID # 94-2607682), located in Roseville, California, the rest and residue of my estate to be used by the Placer County Society for the Prevention of Cruelty to Animals wherever the need is greatest."

### Portion

"I give to the Placer County Society for the Prevention of Cruelty to Animals (tax ID# 94-2607682), located in Roseville, California, \_\_\_\_\_% of my estate to be used by the Placer County Society for the Prevention of Cruelty to Animals wherever the need is greatest."

### Specific Amount

"I give to the Placer County Society for the Prevention of Cruelty to Animals (tax ID# 94-2607682), located in Roseville, California, the sum of \$\_\_\_\_\_ to be used by the Placer County Society for the Prevention of Cruelty to Animals wherever the need is greatest."



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

Companion Animal Care Center  
150 Corporation Yard Road, Roseville, CA 95678  
916.782.7722/530.885.7387 Fax: 916.782.8655

Pet Adoption & Resource Center  
1482 Grass Valley Highway, Auburn, CA 95603  
530.823.7722

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

The Placer SPCA is a private, nonprofit organization not affiliated with any other entity.  
We do not receive donations through the ASPCA or HSUS.

# 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.

**[www.placerspca.org](http://www.placerspca.org)**