



## Three Easy Ways to Make a Planned Gift

### Bequest

A gift from a will (or trust) allows you to make a future donation to the Charlottesville-Albemarle SPCA. The following are samples of appropriate bequest language to share with your attorney:

**Specific bequest** - States a specific amount or asset amount. It may be a gift of cash, securities, real estate or tangible personal property.

Examples:

I give *[specific dollar amount or asset]* to the **Charlottesville-Albemarle SPCA [54-0595009]** to be used for the unrestricted needs of the organization.

I give *[specific dollar amount or asset]* to the **Charlottesville-Albemarle SPCA [54-0595009]** for the endowment.

**Residuary bequest** - Names the **Charlottesville-Albemarle SPCA [54-0595009]** as the recipient of all or a percentage of the remainder of the estate after specific bequests have been fulfilled.

Examples:

I give *[X percent]* or *[the remainder]* of my residual estate to the **Charlottesville-Albemarle SPCA [54-0595009]** to be used for the unrestricted needs of the organization.

I give *[X percent]* or *[the remainder]* of my residual estate to the **Charlottesville-Albemarle SPCA [54-0595009]** for the endowment.

### Retirement Plan Assets

You can name the Charlottesville-Albemarle SPCA as a beneficiary of a 401(k), 403(b) or IRA. You retain full use of your funds in your lifetime with the remainder flowing to the SPCA. To make a charitable gift of retirement assets, you need to complete a new beneficiary designation form naming the Charlottesville-Albemarle SPCA as a percentage beneficiary.

When designating the Charlottesville-Albemarle SPCA, please remember to include the complete organization name and address, as well as the organization's Employment Identification Number (EIN) to ensure accuracy

**Charlottesville-Albemarle SPCA**  
**P.O. Box 7047**  
**Charlottesville, VA 22906**  
**Tax ID/EIN: 54-0595009**

### **Life Insurance Policies**

Whether you own a term or whole life policy or have employer-provided insurance, it's simple to include the Charlottesville-Albemarle SPCA. You can name the Charlottesville-Albemarle SPCA as primary or contingent beneficiary for all or a percentage of your policy. If you also name the Charlottesville-Albemarle SPCA as the owner of the policy, there may be additional tax advantages. Or you could consider funding a new policy for the benefit of the Charlottesville-Albemarle SPCA.

To make a charitable gift of a life insurance policy, you need to complete a new beneficiary designation form naming the Charlottesville-Albemarle SPCA as a percentage beneficiary. When designating the Charlottesville-Albemarle SPCA, please remember to include the complete organization name and address, as well as the organization's Employment Identification Number (EIN) to ensure accuracy

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*\*There are many ways to make a planned gift and the three listed above are just a brief overview. This document is not intended to provide tax or legal advice and should not be relied on as such. You should consult with your financial and estate advisors before committing to any gift.*

If you have any questions, please contact Development at [development@caspca.org](mailto:development@caspca.org).

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