

# BALDWIN COUNTY HUMANE SOCIETY

## PLANNED GIVING

The Baldwin County Humane Society has been helping animals since 1979. We are a 501 (c) (3) non-profit organization, receiving no government funding. The funds we receive are used to rescue, medically treat and re-home abused, abandoned and neglected animals. Every pet adopted through the Baldwin County Humane Society receives a free spay or neuter. This is the proven way to reduce pet over-population, and reduce the resultant euthanasia in our municipal shelters.

### Here are some ways you can help:

- **Cash/Checks.** Please make all checks payable to Baldwin County Humane Society. To make special designations or give a gift in memory or in honor of an individual or pet, please make a notation on the memo section of the check and enclose a separate note with name and address information. We will promptly acknowledge your generosity to the party specified.
- **Matching Gifts.** If your employer has a matching gift program, contact your personnel office before making your gift to Baldwin County Humane Society. They will have a form you can submit to our office at the time that you choose to make your gift. Our office will complete the required form and return it to your employer.
- **Appreciated Stock/Securities.** If you have held stock for more than one year, by contributing appreciated stock to Baldwin County Humane Society before they are sold, you will avoid the capital gains tax and receive a full income tax deduction for the average of the high and low selling price on the day the stock was donated. You can give stocks by having your broker transfer them to the Baldwin County Humane Society account at:

NBC Securities, Attn: Bart Elliott, Vice President  
*"For the Benefit of Baldwin County Humane Society"*  
Account #1628-1079                      DTC #0306  
First Gulf Bank, 949 Fairhope Avenue, Fairhope, Al. 36533  
Phone: 1-251-990-5813

Please let us know what stock you are sending and the number of shares before making the gift so that we can acknowledge and process your gift receipt. You may also send unendorsed stock certificates and executed stock powers in separate envelopes to:

John Reuss, Executive Director  
Baldwin County Humane Society  
P.O. Box 206  
Fairhope, Alabama 36533  
251-928-4585, ext 21 or 800-547-6518, ext 102

You may also deliver the unendorsed certificates and executed stock powers to a bank or broker or the account of Baldwin County Humane Society, noted above, requesting the bank or broker to immediately contact the Humane Society or NBC Securities for instructions. We recommend that donors ***not*** indicate Baldwin County Humane Society as transferee on the assignment form or on the back of the stock certificate on the stock power, and that donors not send the stock to a transfer agent for re-registering in Baldwin County Humane Society's name. These procedures are unnecessary and usually result in needless delay and expense. Transfer of certificates held in book entry or by a custodian Bank or Broker should be discussed with the custodian Bank or Broker.

A letter of transmittal stating the purpose and terms of the gift should accompany stock certificates being transferred to Baldwin county Humane Society. If the gift purpose is at all unusual, it should be discussed in advance with the Executive Director.

- **Real Estate.** Real Estate can be donated to Baldwin County Humane Society in several ways:

***The Life Estate Contract*** – The Life Estate Contract is an agreement between a donor and Baldwin County Humane Society providing for the transfer of a donor's home or family farm to the Baldwin County Humane Society with the donor reserving a life estate for his or her self. The life estate gives the donor the right to live in or on the property, receive income, pay taxes and insurance and maintain the property during his or her lifetime.

***The Giving of Real Estate Outright*** - Sometimes donors may decide they do not want the responsibility of maintaining a home or caring for rental or vacation property. They may not need the income and can transfer title to Baldwin County Humane Society as an outright gift. Any real estate, rental property, or not, can be deeded outright to the Baldwin County Humane Society as a charitable gift.

- **Bequests.** Each year many individuals exercise their privilege to determine the final distribution of their estates and designate that a portion of their assets be used for the benefit and support of the Baldwin County Humane Society. Gifts by will have been an integral part of the American philanthropic tradition since the days of Benjamin Franklin. Such gifts enable a person to make significant contributions that may not have been possible during his or her lifetime. Such bequests may designate that the Baldwin County Humane Society receive a bequest of a certain amount of money or a certain percentage of the estate, or may designate that the Humane Society be the residual beneficiary of the estate after bequests have been made to others.
- **Charitable Remainder Trusts.** The Charitable Remainder Trust (CRT) is similar to other types of trusts except that it has a charity as the beneficiary. It grants or transfers property irrevocably to a trust and specifies how trust income and principal are to be distributed. A CRT can provide an increase in current income and avoidance of capital gains taxes as well as as current income tax deduction for a donor.

- **Life Insurance Policies.** Many, if not most, people own some form of life insurance. The principle reason for this is its unique ability to meet the varied protection needs of an increasingly sophisticated society. An important but frequently overlooked role of life insurance is the one it can play in planned charitable giving. Life insurance itself can be the direct funding medium of a gift, permitting the donor to make a substantial gift for a relatively modest annual outlay. Life insurance can also be used to replace an asset that has been given to a charitable organization. The Baldwin County Humane Society can either be the owner and beneficiary of such a policy or just a beneficiary (primary or successor).

Your attorney, accountant, trust officer, life underwriter, investment advisor or financial planner can tell you everything you need to know about the various giving methods discussed herein and which would be most advantageous for your particular situation.

We appreciate your interest and support and will be pleased to provide you with additional information about the Baldwin County Humane Society's programs and services.