

Planned Gifts

(Gifts from a will, trust
or other financial instrument)



Best Friends®

SAVE THEM ALL®

What is planned giving?

These are gifts given by individuals in a will or trust or other financial instrument. They often occur at the individual's death and are sometimes called "bequests."

The giving is "planned" because it takes some thinking and sometimes the help of others (e.g., an attorney, CPA or financial advisor).

Why should we care?

- Between 2007 and 2061, bequests to charities will total an estimated \$6.3 trillion (CWP).
- In 2016, Americans gave \$30.36 billion to charity through bequest gifts (Giving USA).
- The average bequest amount is most frequently between \$25,000 and \$100,000 (2017 NFS).

Why focus on bequests?

- 90% of all planned gifts are bequests
- Least technical – anyone can do one
- Every donor is a bequest prospect
- Bequests are major gifts
- Outright and deferred (both = Major)
- They aren't an either/or proposition
- If you don't ask, you'll never get

Who are our prospects?

- All donors have the potential to make a major gift when they no longer need their assets.
- Some of the biggest gifts come from donors who give \$25 consistently.



But I don't want to talk about death.

- Start with the idea that every person would like to leave a positive legacy, consistent with their outlook on life.
- Talk about the support of their favorite causes and what they'd like to see accomplished.

It will take too long to see the return.
We need support today.

- If you don't start now, it will take even longer.
- Current donors who make a gift in their will are even more invested in your success.



Where to start

Get board and leadership buy-in.

- Get legal description (see next slide) and materials ready.
- Create a basic marketing plan for where you can promote these gifts.
- Make your own commitment.

Ask your most loyal donors and volunteers.

- Plant the seeds.

Create and stick with your plan.

- Celebrate commitments and share stories.



Sample legal description

I give to Best Friends Animal Society, a Utah corporation with its principal offices at 5001 Angel Canyon Road, Kanab, UT 84741, (the sum of \$_____) (all or _____ percent of my residual estate) to be used for its general purposes.

Tax identification number: 23-7147797



“I’d love to do more, but ...”

“Would you consider making a gift to us through your will or trust?”



Other conversation starters

“Have you considered a gift to XXX in your will?”

“Many donors leave a gift to XXX in their will. Would you consider this type of gift?”

“What causes have been important to you in your life that you want to be part of your legacy?”

“Are there provisions we should know about in advance to fulfill your wishes?”

Stewardship

- The common denominator is that a donor can change his/her mind.
- Stewardship is critical.
- Provide gratitude and recognition.



Have fun with marketing

Create your legacy of kindness
Help Save Them All® today and for generations to come



Best Friends Forever



 **Best Friends**

Forever Friends WINTER 2016



Susan and Zoe

In the words of a Forever Friend

In each issue of this newsletter, we feature a current member of the Forever Friends Society. In this issue, Susan Carney shares why she decided to leave a legacy to the animals through Best Friends.

Susan Carney doesn't remember specifically how she was first introduced to Best Friends — after all, it was 25 years ago — but she knows exactly why she became a member. "Even back then," she says, "there was a Save Them All attitude. And that is fundamentally why I have been a supporter for so long."

For years, she dreamed of visiting the place she felt connected to so deeply, and in 2014, she made her first trip to the Sanctuary. Susan and her husband, Philip Fleming, spent a week volunteering with the animals and exploring the grounds. The experience proved even more profound than she had expected.

From hand-leading a dog who had survived abuse to meeting the crew at Marshall's Piggy Paradise to walking cats in strollers along dusty paths to observing a Parrell Horsemanship demonstration, each moment seemed to confirm that leaving her legacy to Best Friends was the right thing to do.

"I felt such a sense of calm, a sense of relief and joy

knowing that all of the animals at Best Friends will be taken care of throughout their lives," Susan says. "They are safe and loved, even those with medical or behavioral issues. And this was so inspiring and encouraging for me."

From the time she was a small girl, Susan has been passionate about animals. And with five rescued pets at home — three cats and two French bulldogs — animals are very much a part of her everyday life. Her devotion even crept into her professional world. A retired Navy chaplain, Susan envisioned and helped create the first dog park ever to be located on a military base, still in operation at the Naval Air Station Key West in Florida. It's called Angel Paws, named for a beloved bulldog who has since passed.

In August 2015, to celebrate her birthday, Susan and her husband once again visited the Sanctuary. "This is the mission and the vision I want to be a part of," she says.

Where there's a will, there's a way.

When you make a gift to Best Friends through your will or trust, you can preserve your family's legacy, generate personal income and best of all, help save the lives of pets in need.

Together, we can Save Them All®.



435-644-2001, ext. 4503 or legacy@bestfriends.org

WILL POWER

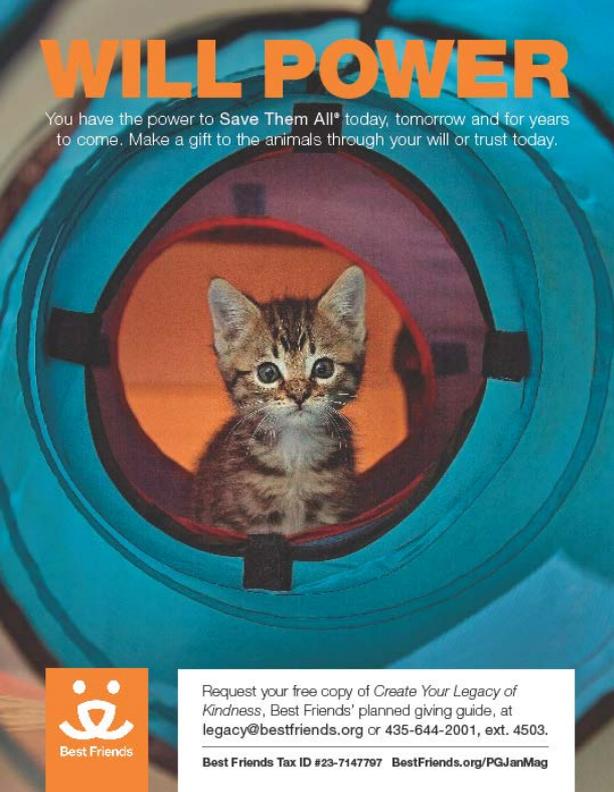
You have the power to Save Them All® — today, tomorrow and for years to come. Make a gift to the animals through your will or trust today.



Request your free copy of "Create Your Legacy of Kindness," Best Friends' planned giving guide:
435-644-2001, ext. 4503 or legacy@bestfriends.org

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Best Friends

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Best Friends Tax ID #23-7147797 BestFriends.org/PGJanMag



Add a little
warm and fuzzy
to your plan ...

... and help **Save Them All**. **Make a gift to the animals through your will or trust today.**

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SAVE THEM ALL

Together, we can **Save Them All**.

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Even pets need **nest eggs**

Some like bones. Others, a ball of yarn. But to homeless pets, nothing beats the promise of a bright, secure tomorrow.

You can help provide just that when you name Best Friends as a beneficiary of your IRA, 401(k) or other financial plan.

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SAVE THEM ALL

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close ✕



Are ***you*** my secret admirer?

Have you made a gift to Best Friends
in your will or trust?

LET US KNOW!

 Best Friends®
SAVE THEM ALL™

Your (unique) role



- Focus on the donor.
- You are helping them fulfill their hopes, dreams and goals by supporting your work.
- Ask the question! The most common reason people don't do this is they've never been asked.
- Keep in touch with your oldest supporters even if they are no longer making annual gifts.

The first steps after notification that you were named in a will or trust

- Request a copy of the governing document (the will or the trust).
- Read it!
- Thank the executor or trustee and establish a point of contact.

We're here to help!

Consider our team a resource if you have questions.

plannedgiving@bestfriends.org

435-644-2001, ext. 4503

