

Confidential Planned Gift Intention Form



1333 Maycrest Dr. Fort Wayne, IN 46805

*I (we) have made a provision for H.O.P.E. for Animals
In my (our) estate to assist animals with spay/neuter/wellness.*

My/our gift to H.O.P.E. for Animals is from my/our WILL:

1. A bequest in the amount of A. \$ _____ (B) or _____ % approx. \$ _____ if realized today.
2. My/our gift to H.O.P.E. is from other assets **NOT** directed by my will:

I/we have included H.O.P.E. for Animals as a beneficiary of:

____ Retirement Plan(s) ____ Bank or investment account(s) [POD or TOD]
____ Life Insurance policy (ies) ____ Rev. Living Trust Other _____

This may result in a gift in the amount of: \$ _____ if realized today.

3. ____ Please note that my gift depends upon a contingency such as the prior death of a spouse/partner or child.

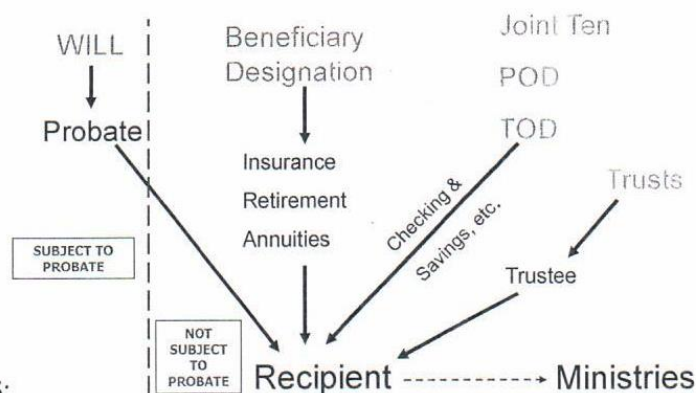
(Please see reverse side for explanations of planned giving types)

Name (Please Print): _____
Address: _____
City/State/Zip: _____
Email: _____ @ _____
Phone/Cell: _____
Signature: _____
Date: ____/____/____

Yes, we will allow you to publish our name in your E-Newsletter recognizing our decision to include H.O.P.E. for Animals in our planned gift giving.

This form is non-binding and does not constitute a legal promise of any future donations to H.O.P.E. for Animals. We understand that bequests, beneficiary designations, etc., are revocable and that your estate plans may change

How Assets Pass at Death



EXPLANATION & DEFINITIONS:

PROBATE: Probate is the court-supervised process of gathering a deceased person's assets and distributing them to creditors and inheritors. The probating of an estate provides oversight and charges a small percentage of the total estate value for their services.

WILL: A legal document that covers four important points after you die:

1) Who will be in charge of your estate as your Personal Representative/Executor; 2) What powers your Personal Representative/Executor will have; 3) Who will inherit your property; and 4) How your property will ultimately be transferred to your beneficiaries.

BENEFICIARY DESIGNATIONS: This is a legally binding document used to transfer the value of certain assets. Beneficiary designations usually are the means to designate recipients of the value of Insurance policies, retirement funds of many types, and commercial annuities. The transfer by beneficiary designation normally avoids probate.

JOINT TENENCY: A type of ownership of real or personal property by two or more persons (typically spouses) in which each owns an undivided interest in the asset. There are several types of Joint Tenancy, some of the more usual include 'with right of survivorship (JTWSROS)', 'tenancy in common' JTIC), or 'Joint Tenancy by the Entirety' available only to married persons.

TOD: TOD means 'Transfer on death' and is used to transfer the value of the account asset. Examples would be stock ownership, stock mutual funds, etc. They are often identified by the receipt of a 1099 DIV for tax purposes.

POD: POD means 'Payable on Death' is used to transfer the value of a 'Debt Instrument'. This applies to common assets such as Certificates of Deposit, Checking & Savings Accounts, etc. For tax purposes these accounts receive a 1099 INT.

TRUSTS: Trusts create a relationship between one or more entities that define certain duties and uses and protect the trust property for the beneficiaries of the trust. Individuals may control the distribution of their property during their lives or after their deaths through the use of a trust. There are many types of trusts and many purposes for their creation. A trust may be created for the financial benefit of the person creating the trust, a surviving spouse or minor children, or a charitable purpose.

The establishment of a charitable gift plan can be as basic as a simple bequest from your will or by beneficiary designation. Conversely, in certain circumstances all parties are better served by a more complex charitable gift plan that will assure that the least amount of unnecessary taxation occurs and that your desired recipients receive what you wish.

H.O.P.E. For Animals
1333 Maycrest Dr, Fort Wayne, IN, 46805
260-420-7729

HUMANE ORGANIZATION FOR THE PREVENTION OF EUTHANASIA
H.O.P.E. for Animals is a 501c3 nonprofit animal welfare organization