



## Why consider ACTION Programs for Animals (APA) for your planned gift?

For 10 years, ACTION Programs for Animals (APA) has worked hard to end the needless killing of dogs and cats in Dona Ana County's municipal shelter. Together with people like you, we've saved the lives of thousands of homeless cats, dogs, puppies and kittens and helped our shelter reverse its kill/save rate. But there is still work to be done to save all those who can be saved!

By making a gift to APA through your will, trust or other financial plan, you can help save at-risk animals in your community now and well into the future. *As part of this program, we can even work with you on a plan to care for your animals should you need that support and should you not have family or friends to rely on when you can no longer care for your furry family members.*

Please contact us by phone at 575-644-0505 or by email at [mail@apalascruces.org](mailto:mail@apalascruces.org) to learn more and consult with a financial expert/planner for help and advice. We can all work together to devise the best plan for YOU!

### Make a Lasting Impact: What is Charitable Planned Giving?

Charitable planned giving refers to the process of making a charitable gift of estate assets to one or more nonprofit organizations—a gift that requires consideration and planning in light of the donor's overall estate plan. The most effective way of making a charitable gift is to plan the gift so that it achieves as many personal objectives as possible.

## Benefits to the Donor:

- Make possible a more significant gift than would otherwise be possible
- Provide free estate planning information of a general nature
- Shelter current income through substantial tax deductions
- Opportunity to establish a living memorial for yourself or someone special to you
- Reduce federal estate taxes and probate expenses
- The satisfaction of leaving a legacy of saving lives



## Benefits to APA:

- Result in larger gifts to support our mission and vision for Dona Ana County's homeless animals
- Help in planning realistically for the future
- Build endowment to fund growth and expansion
- Secure operations by stabilizing future budgets during lean years
- Assure that unwanted animals will continue to have an opportunity for a second chance at life in the years ahead
- Provide the satisfaction of having helped others to effectively plan their estates and care for the animals

## Benefits to the homeless animal community:

- Freedom from abuse and neglect and the threat of unnecessary euthanasia for animals that can be saved
- A chance to be adopted into a loving and caring family or transported to an area of the United States where there are more homes available



## Types of Charitable Planned Gifts

### Bequest

Include a provision in your will or living trust to make a bequest to a charitable organization such as APA. That arrangement would be a "planned" gift. A gift in a will or trust could be in the form of cash, securities, real estate or personal property, or a percentage of the estate. If you currently have a will, you can make arrangement to add a gift through a will codicil.

### Charitable Trusts

Establish a charitable trust that could provide income to the donor (or someone else) for a period of time (often for life). After this gift-deferral period, the trust would mature and the remaining assets would go to one or more charitable beneficiaries.

### Appreciated Property

This is a gift of securities, real or personal property, held long-term which has increased in value since date of acquisition, given outright to APA or as the funding asset for a lifetime income plan.

### Life Insurance

Name APA as the beneficiary of an existing policy that is no longer needed for the donor's original purpose or purchase a new policy making APA the owner or beneficiary.

## Things to know...

- Bequests can take many forms. You may bequeath a specific amount of money or property; a specified percentage of the estate; or all or part of the residue of the estate.
- Donors can receive a lifetime of income from both gift annuities and charitable trusts. Both provide income to the donor for his or her lifetime, then the remaining amount in the fund is transferred to APA.
- Our nation's tax laws offer special incentives for gifts of non-cash property, such as securities or property. This is especially true if the property has increased in value since acquisition.
- You pay no capital gains tax on the appreciation of securities that are donated to APA. You also receive an income tax deduction for the full market value of the gift.
- You can give property outright or retain rights to ownership for a set period. This may be attractive to a donor considering leaving property to APA through a will but would like to transfer the gift now to receive the income tax advantages and increase cash flow.
- There are two ways to donate life insurance. The first one is to make APA the owner of the policy. This allows you an immediate charitable tax deduction. The second option is making APA the beneficiary of the policy. When you name APA as the beneficiary of your policy, it does not entitle you to any immediate tax savings, but you will qualify later for an estate tax charitable deduction.



Always be sure to consult with your own financial advisor when devising your charitable giving plan. You can also consult with APA on an agreement to oversee the care of your cats or dogs in the future if you do not have family or friends to rely on. We appreciate you including us in your planned giving and are happy to work with you.