

SUPPORT HART THROUGH YOUR ESTATE

Leaving a legacy does not require great wealth—even the most modest gifts reflect a compassionate commitment to a cause and provide a way for you to leave your stamp on the future of the charity you support. The ideas below list several examples of ways to grant a legacy—any phrasing offered is for illustration purposes only. Please consult your tax advisor for legal advice on the many ways to leave a legacy gift that will benefit HART’s homeless cats and kittens.

On behalf of the HART Board of Directors, staff, volunteers, and feline residents, thank you for your generosity and support.

SOME BEQUEST EXAMPLES

Unrestricted Gift

“I give to the Homeless Animal Rescue Team, HART, a California non-profit corporation located in Cambria, California, [list a monetary amount, specific items, property, or any combination thereof]. This gift shall be used for general purposes as the Board of Directors, at their sole discretion, may deem in the best interests of HART.”

Unrestricted Memorial Fund Residue

“I give to the Homeless Animal Rescue Team, HART, a California non-profit corporation located in Cambria, California, the rest and residual of my estate, to be known and designated as "The [name you choose] Memorial Fund." The funds shall be used for general purposes as the Board of Directors, at their sole discretion, may deem in the best interests of HART. The said Board of Directors shall have the right to expend the whole or any part of the principal of said sum in connection with a definable project or purpose, provided there is a suitable memorial in the name of the Memorial Fund.

Restricted Memorial Fund Residue

“I give to the Homeless Animal Rescue Team, HART, a California non-profit corporation located in Cambria, California, the rest and residual of my estate, to be known and designated as "The [name you choose] Memorial Fund." The funds shall be used for [describe the purpose, e.g., “medical expenses for sick cats,” “spaying/neutering”] If it is found that all or part of the income from this fund is no longer needed for the purpose stated, then such gift may be used for such other purposes as the Board of Directors, at their sole discretion, may deem in the best interests of HART, giving consideration to my special interest as evidenced by the purpose described above.”

Life Insurance

If you are the holder of a life insurance policy and inclined to do so, you may designate HART as your life insurance policy's primary beneficiary or as a secondary beneficiary after family members or friends. You may set guidelines delineating the scope and use of the funds, with HART’s felines as the ultimate beneficiaries of your generosity.

IRA Beneficiary

An IRA account allows you to leave the funds to any named beneficiary you choose, independent of your will. Listing HART as the primary or secondary beneficiary on your IRA is an easy way to give support. Since HART is a charitable organization, the IRA assets would not be subject to taxation. According to the The Pension Protection Act of 2006: owners (70½ years or older) of traditional or Roth IRA's can give tax-free gifts directly to non-profit charities, such as HART.

More Bequest Options

IRA charitable rollovers, donor advised funds, and charitable gift annuities are some additional options. Consult your tax advisor and/or attorney. Their guidance and legal advice will help you plan a charitable legacy tailored to your needs and expectations.

Again, thank you for considering HART in your bequest.