



LIGHT THE WAY WITH PLANNED GIVING



Morris Animal Foundation —
funding research to protect, treat
and cure animals worldwide.



A HISTORY OF ANIMAL HEALTH BREAKTHROUGHS

Morris Animal Foundation's (MAF) sole, unwavering focus is to improve the health and well-being of animals — and we've been doing so for more than 60 years.

Since our beginnings in 1948, we've championed groundbreaking health research studies that have helped companion animals, horses and wildlife on every continent. Today, MAF is the world's largest nonprofit organization dedicated to funding research studies to protect, treat and cure animals.

Our work has resulted in better knowledge of diseases, and the development of preventions, treatments and vaccines that have saved and improved the lives of millions of animals. Many of our studies have led to the gold standards in veterinary care for pets and have helped save endangered species.

We're still working toward tomorrow's health advances. Your estate gift can help us reach our goals and bring better health to animals for generations to come.

LEARN MORE: Discover the benefits of a planned gift and calculate the best option for you at www.MorrisAnimalFoundation.org/planned_giving.



LIGHT THE FUTURE FOR ANIMALS

An estate gift to MAF benefits animal health for generations to come. Benefactors who include MAF in their estate plans become part of our honorary Lamplighter Society — donors who are lighting the way for the future of animal health.

The gift you pledge today is critically important to the animals of tomorrow. You can make this type of gift through a will or bequest, charitable gift annuity, trust, life insurance policy or gift of stock or appreciated securities. These options may provide you with income for life, provide immediate tax breaks for you or provide future tax breaks for your heirs.

Please contact us if you would like to discuss a planned gift and join our Lamplighters Society.

Planned Giving Department
10200 East Girard Avenue, Suite B430
Denver, Colorado 80231

800.243.2345
www.MorrisAnimalFoundation.org/planned_giving

BEQUESTS

The simplest way to give to MAF is to specifically name our Foundation as a recipient of a bequest (or gift) in your last will and testament or living trust. You can specify a dollar amount or donate marketable securities or real estate. Your gift can include all or a percentage of your total estate, all or a percentage of your residuary estate or a contingent bequest that comes to MAF if your primary heirs do not survive you.

CHARITABLE GIFT ANNUITIES

A *charitable gift annuity* (CGA) provides an excellent way to guarantee income for life while helping the world's animals. A CGA is a contract that involves transferring a gift of cash or publicly traded securities to MAF in exchange for a fixed annuity. MAF guarantees income for life to you and/or other beneficiaries of your choice. The rate of each person's annuity is fixed at the time the gift is made and is based on the size of the gift, the age of the annuitant and the prevailing rates at that particular time. Annuitants must be at least 65 years old, and the minimum annuity gift to MAF is \$10,000.



TRUSTS

A *charitable remainder trust* is a charitable trust that pays income to you or someone you designate for life or for a specified number of years. Payments can be a fixed annual amount or a percentage of the trust's annual value. At the death of the final beneficiary, the balance of the trust will go to support MAF's mission.

A *charitable lead trust* allows you to make a temporary gift to MAF for a stated number of years. Your assets are placed in a trust that distributes its income to the Foundation. At the end of the designated time period, you regain control of the assets, or they are distributed to the beneficiaries of your choice. This is an excellent estate-planning tool for those wishing to make charitable gifts and still retain wealth for themselves or other loved ones.

GIFTS OF LIFE INSURANCE OR RETIREMENT ASSETS

Designating MAF as the beneficiary of your retirement plans or life insurance policies is a fine way to make a gift to animals. Examples include a 401(k), 403(b), IRA or life insurance policy.

You may designate your retirement fund assets to be transferred directly to MAF at your death, or you may direct your assets to fund a charitable remainder trust, which can pay income to your surviving spouse or other heirs.

Life insurance policies offer an easy way to make a gift with perhaps little to no out-of-pocket cost. You can designate MAF as the beneficiary of the policy, as the owner or as both at once. Gifts may be created with paid-up policies, policies on which premiums are still being paid or new policies. Depending on how the gift is designated, certain income tax deduction benefits may be obtainable.

To include MAF in your estate plans, please use the following language:

Morris Animal Foundation, a nonprofit 501(c)(3) under Colorado law with its principal business address of 10200 East Girard Avenue, Suite B430, Denver, Colorado 80231.

FEDERAL TAX ID: 84-6032307

Please consult your legal or tax adviser before making any planned gift.



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