

# PARTNERS FOR Tomorrow

Financial & Gift  
Planning Ideas  
for Friends  
of SPCA  
International



**SPCA**  
INTERNATIONAL

**GLOBAL  
ANIMAL  
RESCUE**

Spring 2016

## Many Ways to Say Thanks

**S**aying or expressing thanks is universal. As humans, we can simply say the words. For our 4-legged friends, their thanks is shown in other ways—by a dog wagging his tail and licking your hand or a purring cat rubbing up against your legs. Their gratitude is evident, even without any words spoken.

Each year, SPCA International receives gifts from our friends who support our programs, such as Operation Baghdad Pups and Operation Military Pups as well as our mission of providing spay and neuter services to pets and strays and emergency shelter support to thousands of animals around the world. Every financial gift is meaningful to us and ultimately to those animals in crisis as well as those men, women and children who love them. SPCA International is profoundly grateful for the generosity of our donors.

One way some choose to support our work is to include us in their estate plans, such as a gift in a will or trust. For those who make a gift commitment and let us know, we recognize and honor them in a special manner. It is our small, yet heartfelt, way of saying “thank you.”

And though many have let us know their intentions, there are some with whom we never have the opportunity to express our thanks during their lifetime. It is only after they are gone that we learn of their generosity.

So for all of those—known and unknown—who have included SPCA International in their will, trust or other estate plans, we want to say the words “thank you” from the bottom of our hearts. Your gifts allow us to create a legacy that will continue to ensure the health and well-being of animals all over the world for years to come.

With gratitude,

Meredith Ayan  
Executive Director



**INSIDE** Q&A About the  
Importance of  
Planning Your Estate

Planning Your  
Pet's Future with  
a Pet Trust

# Q&A About the Importance of Planning Your Estate

## Q: Who will receive your property if you don't have a will?

**A:** State law dictates who will receive your property. It is generally divided among surviving relatives under the terms of a rigid formula.

## Q: Is there such a thing as an “all-purpose” will?

**A:** There's no law that says you have to make a will or other estate plans. But there are laws that dictate what happens to your property if you don't. In fact, each state has laws directing what will happen to property if a person fails to make their own arrangements.

## Q: How much will my heirs receive?

**A:** Since lawmakers cannot possibly know your wishes concerning your survivors, each receives a share of your property based on how closely they are related to you. It is possible your property will be given to distant relatives you may never have met. If no legal heirs can be found, your assets will become the property of the state and normally sold at auction. Other loved ones or charitable interests are never included in the state's will.

## Q: How much will be left and when?

**A:** Extra costs can result if you decide to forego making a will or other plans and rely on the “estate

plan” provided by your state. And distribution of what is left after costs are paid cannot occur until heirs are found, bonds are posted and accountings are prepared. In the absence of a valid will, the settlement of an estate can thus result in greater expense and require much more time than would be necessary if adequate instructions were left.

## Q: Do people include their pets in their estate plans?

**A:** Yes. It is estimated that 68 percent of U.S. households have a pet. Almost 10 percent of cat and dog owners have made provisions to provide for their pets in the event of their death or significant illness. This percentage represents a substantial increase from previous years.

## Q: Can I name my pet a beneficiary in my will?

**A:** Unfortunately, no. State laws treat pets as property. Therefore, one must leave money or other assets to a caretaker who will look after the pet. However, there is no legal obligation for the person you name to use the money to care for your pet. Therefore, it is important to name someone you trust to assume that responsibility. (See Page 3 for tips on setting up a pet trust in your estate plans.)



Tanzania, home to the largest game reserve on the African continent, is a destination for both wildlife hunters (who primarily target lions) and ivory poachers. To combat these ongoing crises, SPCA International is developing a petition to further pressure the Tanzanian government to ban all hunting licenses as well as developing partnerships with others concerned with critical extinction issues. Your ongoing support ensures our work will continue in the future.



# Planning for Your Pet's Future with a Pet Trust

**P**ets are very dear to us and have a special place in our hearts, so it is important to make sure that they are cared for after we are gone.

When making your estate plans, you can provide for your pet in the future through what is known as a pet trust. Much like a trust established for the care of a minor child, the trustee you name is legally obligated to act in the animal's best interest and ensure your desires for your pet's future care are met. It's also a good idea to name an alternate in case the original caretaker is unable to serve.

## Creating a plan

The assets you leave in the trust can be used for anything related to the care and well-being of your animal. From food and treats to veterinary bills, your pet trust will ensure that your pet is taken care of in the ways that you specify.

It is also important to create a "Pet Care Plan." This will outline everything from your pet's medical history to the specific type of food they require. In this plan, you can include important information such as vet information, pet sitter's information, groomers, medical history and other service providers. You can even include your pet's habits, likes and dislikes. Anything that you believe will ensure your pets receive the right care and attention should be included.

While the majority of states permit some form of a pet trust, details and limitations do vary. It is best to check with your attorney about local laws.

## Peace of mind

Pets give us so much joy and love in our lives and are valued members of our family. It is important to ensure they are taken care of when we can no longer do so ourselves.

Planning for their future can give us peace of mind and comfort that is priceless.

Operation Baghdad Pups continues to be one of SPCA International's most active programs. Since we began the program in 2008, we have been able to rescue and reunite more than 550 animals from countries in the Middle East, Asia and Africa.

Recently renamed "Operation Baghdad Pups: Worldwide" we have expanded our scope to cover anywhere in the world where our members of the military are located. This is our heartfelt way of giving back to our brave troops who are the true heroes and reuniting them with the animals they have grown to love.



# Explore Other Giving Options

**Y**ou can make future gifts to SPCA International from financial plans you may have previously earmarked for other purposes. If you want to make a meaningful and lasting charitable gift to SPCA International, you can:

- Name SPCA International as beneficiary of all or a portion of the remainder of **retirement plan accounts**.
- Give a share in the proceeds of **life insurance policies** no longer needed for their original purpose.
- Name SPCA International to receive all or a portion of what remains in **investment accounts** through what are known as “pay on death” provisions.

## More information

Return the enclosed card for more information about including SPCA International in the charitable aspects of your plans. Or contact us to discuss this or any other information in confidence and with no obligation.

## More information

For more information about creative ways to make SPCA International a part of your legacy, visit our website at

[www.spcai.givingplan.net](http://www.spcai.givingplan.net)



## Sample Bequest Language

Many of our friends choose to include SPCA International in their wills or other estate plans. Below is some suggested wording to take to your attorney to ensure your wishes are followed.

“After fulfilling all other provisions, I give, devise, and bequeath \_\_\_\_% of the rest, residue, and remainder of my estate [or \$\_\_\_\_ if a specific amount] as a charitable contribution to SPCA International, Federal Tax ID #87-0773320, 242 West 30th Street, Suite #1001, New York, NY 10001.”

The purpose of this publication is to provide general gift, estate, and financial planning information. It is not intended as legal, accounting, or other professional advice. For assistance in planning charitable gifts with tax and other financial implications, the services of appropriate advisors should be obtained. Consult an attorney for advice if your plans require revision of a will or other legal document. Tax deductions vary based on applicable federal discount rates, which can change on a monthly basis. Some opportunities may not be available in all states. ©MMXVI RFSCO, Inc. All Rights Reserved. NYEX-16

## CONTACT US:



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