



*Your local no-kill shelter, giving abandoned animals a second chance.*

Regent Parkway, Ste. 103  
Fort Mill, SC 29715 – 803-802-0902

## Bequest

### ***Join the Humane Society of York County's Paw Prints Legacy Society***

A gift from a will (or from a trust) allows you to make a future donation to the Humane Society of York County. *The following are samples of appropriate bequest language to share with your attorney:*

1. **Specific bequest** - States a specific amount or asset amount. It may be a gift of cash, securities, real estate or tangible personal property.
  - Examples:
    - I give [specific dollar amount or asset] to Humane Society of York County, Inc.[57-0655492] or its successor to be used for the unrestricted needs of the organization.
    - I give [specific dollar amount or asset] to Humane Society of York County, Inc.[58-1342479] for endowment.
2. **Residuary bequest** – Names Humane Society of York County, Inc.[57-0655492] as recipient of all or a percentage of the remainder of the estate after specific bequests have been fulfilled.
  - Examples: I give [X percent] or [the remainder] of my residual estate to Humane Society of York County, Inc.[57-0655492] or its successor for the unrestricted needs of the organization.
  - I give [X percent] or [the remainder] of my residual estate to Humane Society of York County, Inc.[57-0655492] for the purpose of endowment.
3. **Retirement Plan Assets**
  - Retirement plan assets are often considered the attractive option for making a planned gift since these are among the most tax burdened assets in an estate.
    1. Making a future gift of retirement plan assets to your favorite organization, such as Humane Society of York County, Inc. may reduce estate tax liability, while allowing you to leave assets that receive more favorable tax treatment to other beneficiaries (i.e., your descendants).
  - To make a charitable gift of retirement assets, you need to complete a new beneficiary designation form naming the charity as a percentage beneficiary.
    1. When designating the charitable organization, please remember to include the complete organization name and address, as well as the organization's Employment Identification Number (EIN) to ensure accuracy.



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- Humane Society of York County, Inc. 8177 Regent Parkway, Ste. 103, Fort Mill, SC 29715 Tax ID/EIN: 57-0655492 Tel: 803-802-0902

[www.humanesocietyofyorkcounty.org](http://www.humanesocietyofyorkcounty.org)

#### **4. Life Insurance Policies**

- You may use one or more whole life insurance policies to make a future gift to your favorite organization, such as Humane Society of York County, Inc.
- To use a life insurance policy to make a gift, you could name the organization as a percentage beneficiary of a new or existing policy or transfer ownership of a new or existing policy to the beneficiary organization. As with retirement plan assets, using a life insurance policy to make a charitable gift can be as simple as completing a new beneficiary designation naming the charity as a percentage beneficiary. Again, please include the complete organization name and address, as well as the organization's EIN when naming it as the beneficiary, to ensure accuracy. If you chose to name Humane Society of York County as a life insurance beneficiary, for example, you would include the following information:
  1. Humane Society of York County, Inc. 8177 Regent Parkway, Ste. 103, Fort Mill, SC 29715 Tax ID/EIN: 57-0655492 Tel: 803-802-0902  
[www.humanesocietyofyorkcounty.org](http://www.humanesocietyofyorkcounty.org)

\* There are many vehicles to making a planned gift and the above is a brief overview. This document is not intended to provide tax or legal advice and should not be relied on as such.

**Potential donors should consult with their legal and tax counsel to understand the implications of a specific charitable gift.** If you have any questions, please contact our Board Chairperson, Mary Beth Knapp at 704-287-6475 or email [contact@humanesocietyofyorkcounty.org](mailto:contact@humanesocietyofyorkcounty.org)