

# We Are Here To Help You

**The Humane Society of Northwestern Pennsylvania** is here to work with you and your legal advisors in designing a gift suited to your particular needs.

If you choose to leave a bequest, we will see that **it is put to the greatest use in helping animals who cannot help themselves.** Once you have made provisions for the Humane Society of Northwestern Pennsylvania in your estate plan, please let us know so that we can thank you now for your future support.

**We sincerely appreciate your consideration** of the Humane Society of Northwestern Pennsylvania as you make plans for the distribution of your estate.

It is because of your kindness that we can continue to support our programs and services, including the receiving and adoption of animals, education outreach programs, animal cruelty investigations, and more.



## Contact Us

If you have any questions about making a bequest to the Humane Society of Northwestern Pennsylvania, please contact:

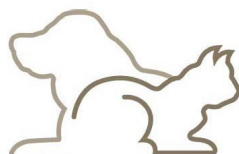
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(814) 454-1600  
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**THE HUMANE SOCIETY**  
of Northwestern Pennsylvania

## Information for your Legal Advisor:

### Our legal name

Humane Society of Northwestern  
Pennsylvania

### Mailing Address

P.O. Box 3930  
Erie, PA 16508-0930

### Physical Address

2407 Zimmerly Road  
Erie, PA 16506

### Federal Tax ID

25-1010297

### Relationship

Tax exempt 501(c)(3) Pennsylvania  
non-profit organization

[humanesocietyofnwpa.com](http://humanesocietyofnwpa.com)

# Estate Planning

with The Humane Society of  
Northwestern Pennsylvania in mind



**The Humane Society**  
of Northwestern Pennsylvania

# Your Will or Living Trust

Your will and trust allow you to distribute your property as you wish for family, friends and causes you believe in.

If you already have a will or trust, you can normally add or increase a charitable bequest with a simple one page amendment. And of course, no federal estate taxes will be due on the value of the bequest. You can:

- Designate a specific dollar amount or piece of property to be given to the Humane Society of Northwestern Pennsylvania
- Designate a percentage of your overall estate
- Name Humane Society of Northwestern Pennsylvania as a contingent beneficiary, should one or more primary beneficiaries not survive you
- If you choose to establish a pet trust, you can also name the Humane Society of Northwestern Pennsylvania as a contingent beneficiary upon the death of your pet(s)



*The following are five common ways of making a bequest, along with suggested language:*

## 1. Donate a Percentage of Your Estate

I give and bequeath \_\_\_\_% of my estate to the Humane Society of Northwestern Pennsylvania, a Pennsylvania nonprofit corporation currently located at 2407 Zimmerly Road, Erie, PA 16506.

## 2. Make a Specific Dollar Bequest

I give and bequeath the sum of \$\_\_\_\_ to the Humane Society of Northwestern Pennsylvania, a Pennsylvania nonprofit corporation currently located at 2407 Zimmerly Road, Erie, PA 16506.

## 3. Make a Specific Gift of Property

I give my property located at \_\_\_\_ to the Humane Society of Northwestern Pennsylvania, a Pennsylvania nonprofit corporation currently located at 2407 Zimmerly Road, Erie, PA 16506.

## 4. Make a Residuary Bequest

I give and bequeath all (or a specific percentage) of the residue of my estate to the Humane Society of Northwestern Pennsylvania, a Pennsylvania nonprofit corporation currently located at 2407 Zimmerly Road, Erie, PA 16506.

## 5. Contingent Gift

If (name of beneficiary) does not survive me, I give the residue of my estate to the Humane Society of Northwestern Pennsylvania.

# Other Options

## Life Insurance Policies

You can name the Humane Society of Northwestern Pennsylvania as the primary or secondary beneficiary of all or a portion of your life insurance policy. If your policy is paid in full, you can donate the policy and receive a tax deduction now.

## Retirement Plans

If you have an IRA, 401(k) or 403(b) plan, you can name the Humane Society of Northwestern Pennsylvania as a primary or secondary beneficiary to receive all or a portion of the proceeds from your retirement plan. You can simply request a Change of Beneficiary form with your provider. Our tax identification number is 25-1010297.

## Pooled Income Fund and Charitable Remainder Trusts

More sophisticated estate planning tools can also be used to help animals. These life-income gifts provide an annual payment to you for your lifetime as well as a charitable tax deduction. Please contact our development office for a more detailed explanation.



For more information, contact Nicole Bawol at (814) 835-8331, x24 or Gery Nietupski, Esq. at (814) 454-1600