Planning Your Legacy: The “Five Ps”

Creating your Will or a Living Trust—or updating an existing one—doesn’t have to be difficult or time consuming. Follow these “Five Ps” to get started.

1. **Property** — List your assets (your home, jewelry, artwork, investments, savings, insurance, and retirement plans) and your liabilities (mortgages, loans, and credit card debt) along with their current estimated value or cost.

2. **People** — List the people and charitable organizations you’d like to provide for in the future.

3. **Pets** — Remember to make plans for the care of your beloved pets.

4. **Plans** — Match your property (your assets) with the people and charitable interests in your life.

5. **Planners** — List any loved ones and the professional advisors you would like to have assist you in making your plans a reality.

If you’d like more information or need help with gift planning, please feel free to contact:

The National Humane Education Society
Cathy Mangeri, Membership Services
Telephone: 304-725-0506, ext. 204
Email: plannedgifts@nhes.org
Website: www.nhes.org

“The National Humane Education Society is, by far, my favorite animal charity. They have taken eight dogs I have rescued and found homes for every single one. I think so highly of NHES that they are in my and my wife’s will for a substantial amount.”

— Loyal Donor
How to Make a Bequest

A bequest can be made for a specific amount or for a percentage of your residual estate.

You must name (designate) your beneficiaries (heirs, both individual and charities), using their proper legal names.

Consider your beneficiaries’ needs

Perhaps you would like to help your grandchildren with college expenses, or help your children with a down payment on a house or medical expenses. Be specific, and mention your beneficiaries and bequests by name.

Provide for your companion animals

Make provisions to cover the care of your beloved pets. This includes naming guardians for your companion animals and considering the finances required to care for them.

Provide for charities you care about

We hope you’ll remember The National Humane Education Society (NHES) in your gift planning. By including a charitable gift to NHES, you can take advantage of special estate tax savings.

Other Types of Gifts

Gifts of Stocks or Securities

You can transfer stock or other securities to The National Humane Education Society. When you do, they are tax deductible at their fair market value. And, if you have held the securities for more than a year before donating them to NHES, you will not be liable for capital gains tax on any appreciation.

Suggested Bequest Language for The National Humane Education Society

“I bequeath the sum of $______ or ______% of my residuary estate (or provide a description of the property or stock that is to be donated) to The National Humane Education Society to be used in such a manner as its board of directors may determine.”