



## 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.

*“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



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

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## Creating Your LEGACY



Your Guide to Planned Giving  
*Wills, Living Trusts, and Bequests*

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## Create Your Own Legacy

You want to be able to decide who will receive your assets after you've gone. Wills and Living Trusts are the most common legal documents most people use to plan their estates.

**A Will** is subject to probate—a formal validation by the court of the intentions you've outlined. Your Will becomes part of the public record.

**A Living Trust** is not subject to probate and is not part of the public record. Your assets can often be distributed more quickly through a Living Trust than through a Will.

## About Bequests

Bequests are the most common form of gift planning. **Bequests are:**

**Flexible:** Through your Will or Living Trust, you can bequeath (or pass on) your assets to the individuals and charitable organizations you care about. If circumstances change, you can make changes to your bequests.

**Low Cost:** Bequests can be made without dipping into your savings or other assets. You use your assets as you need them while you're alive and bequeath them to others after you're gone.



## 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."