

planned GIVING



*"I'm not a wealthy person, but the reason I'm supporting the ARL is simply because I've always been an animal lover and owner, although quite frankly it is more or less a matter of being owned by them... I'm sure the impact of my planned gift will depend on what it amounts to, but I am hopeful it will create some sort of change."
- Barbara S.*

ESTABLISHED
1952

**ANIMAL
RESCUE LEAGUE**

OF BERKS COUNTY

leave a LEGACY

WHAT IS PLANNED GIVING?

A planned gift is any charitable contribution that considers your personal tax, financial and estate planning circumstances, which requires the participation of the donor's professional advisors. Every person's situation is unique and there are many ways to support the life-saving work of the ARL while considering your own situation.

HOW CAN I HELP?

You have many options to continue to support animals in need. We are always here to discuss your needs or specific wishes; however, we encourage you to consult with an attorney or financial advisor when considering a planned gift. Following are some of the more common options to consider.

BEQUESTS

By preparing now, you can enjoy peace of mind, knowing you have taken care of those you love as well as the causes that are important to you. Your will or revocable trust provides a simple and flexible way to save the lives of homeless pets for years to come. You can specify:

- A specific dollar amount gift or a particular asset
- A percentage or remainder of your estate

If you don't have an existing attorney relationship, the ARL has partnered with FreeWill to help you update or start your estate plan today. This online will-writing resource takes 20 minutes to use and helps you create your legal will and establish your legacy with the ARL at no cost. Go to freewill.com/berksarl to get started.

Throughout the history of the Animal Rescue League, some of our greatest accomplishments were made possible through Planned Gifts:

1963: The donation of land by our founder, Mary Archer, solidified our location and laid the foundation for the future of the ARL.

1977: A new shelter facility was erected, replacing the original shelter which had fallen into disrepair and providing improved accommodations for the animals in our care.

1995: The establishment of a surgery center enabled us to perform spay/neuter surgeries for all shelter pets.

2008: An addition to the shelter was built, facilitating the creation of meeting spaces, administrative offices, a reception area, and additional kennel spaces.

2018: We began operating under a "no-Kill" philosophy, no longer euthanizing treatable and adoptable animals for space. This announcement created a surge in community support including planned gifts.

2024: Improvements are made to cat housing, improving our quality of care of our most vulnerable residents.

As we look to the future, planned gifts will continue to play a crucial role in advancing our mission and allowing us to adopt modern sheltering methods, ensuring the continuation of our life-saving work for years to come.



As always, we recommend that you consult your tax or financial professional for advice before making charitable donations. The first step in making a gift of this type is to provide you with the following securities transfer information*:

DTC code: 0725

Account number: 4968U342

Account name: Animal Rescue League of Berks County

Animal Rescue League EIN: 23-1417505

Receiving institution (a financial intermediary, name may appear on transactions): Raymond James

*When you make a gift to the ARL by transferring stocks into our account, we do not receive any information that identifies you as the donor. To ensure that you receive a proper tax acknowledgement of your gift, please let us know. You can reach us by emailing phummel@berksarl.org or calling 610-621-4597.

RETIREMENT ASSETS

These accounts and plans can be valuable assets as they grow tax deferred and are easier to accumulate retirement savings over taxable investments. However, both are subject to estate and income taxes when they pass to beneficiaries. Because the ARL is a non-profit organization, we won't pay taxes on a distribution, nor will the gift be subject to estate taxes.

If you own a traditional IRA or 401K, you are required to take a minimum distribution (RMD) after a certain age (age 72 as of publication; if you were born in 1960 or later you can delay RMDs until after age 75). RMDs could impact Medicare costs as well as income taxes and there are penalties for missing withdrawals. Sending your RMD directly to the Animal Rescue League will avoid those impacts.

STOCK GIFTS

A donation of appreciated stocks, bonds or mutual funds is a great way to support the ARL and you may receive a significant tax break from the IRS. We sell your stock then use the proceeds for our lifesaving work and you avoid capital gains tax.



GIFTS MADE NOW

The Animal Rescue League of Berks County is a 501(c)(3) nonprofit organization that relies on contributions from our supporters. A significant portion of our support comes from monthly, quarterly or annual gifts. All contributions are tax-deductible to the extent allowed by law.

Please note that this document is provided as general information about charitable giving options and strategies that help donors maximize tax savings while helping the Animal Rescue League. No part of this document is intended as legal advice. Please consult with a tax, estate planning or financial professional to determine the best option for your situation.



EVERY PET
DESERVES A
WELL-MAPPED
TOMORROW.

BEQUEST INTENTION FORM

Please let us know if you have included us in your future plans

It can often be difficult to plan and make sure that your gifts are used in line with your wishes if they are left unknown. But more importantly, we want to say thank you for considering our work as a part of your legacy.

We know that life circumstances can change and you may need to alter or reconsider your gift in the future. That's all right — reporting your gift today does not obligate you now nor in the future.

Name: _____

Date: _____

Address: _____

Phone: _____

Email: _____

We will be delighted to recognize your support by including you in the 1952 Society, which gives you early access to special events and promotions and an invitation to our 1952 luncheon, an annual gathering hosted by our leadership team.

Thousands of animals will benefit from your support - Thank you!

Please email the completed form along with a copy of the page in your will that mentions the ARL to phummel@berksarl.org or mail to:

ATTN: Penny Hummel, Donor Advisor
Animal Rescue League of Berks County
58 Kennel Road
Birdsboro, PA 19508

**Now is the time to make sure your legacy of love
will help those who need it most.**

To start the conversation, please contact:
Penny Hummel, Donor Advisor
phummel@berksarl.org | 610-621-4597