



Estate Planning

Leave a Legacy

Giving a Bequest

Providing for a charitable bequest to New Fairfield/Sherman Animal Welfare Society in your will or living trust is an easy way to make a significant contribution that you may not be able to make during life. There are many ways you can achieve this and some examples are listed below. *Always check with your attorney or estate planner for guidance.*

Gifts of Retirement Plan Assets

Make a gift from your IRA, 401(k), 403(b), or other defined contribution plan by naming NFSAW as a beneficiary of all or a percentage of whatever remains in the fund at the end of your life.

Gifts Directed From Your Will or Living Trust

Charitable bequests and living trust directions can take various forms.

A **specific bequest** or direction instructs that NFSAW receives a specific portion of your property.

Example: "I give to New Fairfield/Sherman Animal Welfare Society all of my shares in ABC Company to be used for the general purposes of said charity."

A **general bequest** directs that NFSAW receives a specified dollar amount. Example: "I give to New Fairfield/Sherman Animal Welfare the sum of \$150,000 to be used for the general purposes of said charity."

A **residual bequest** designates all or a portion of the remaining assets after all debts, taxes, expenses, and other bequests have been paid. Example: "I give to New Fairfield/Sherman Animal Welfare Society twenty five percent (25%) of the rest, residue, and remainder of my estate, to be used for the general purposes of said charity."

Gifts of Life Insurance

Make a gift of life insurance by naming NFSAW as a beneficiary of all or a percentage of the proceeds payable at the end of your life. You would be able to alter the named beneficiaries if your family circumstances change.