



LEGACY *of* LOVE



LEGACY OF LOVE



Since 2009, Lucky Dog Animal Rescue has worked to end the pet homelessness and save dogs and cats from high-kill shelters. Together, with people like you, we've saved the lives of over 24,000 homeless, abandoned and neglected Lucky Dogs and Cats and helped them find loving forever homes.

By making a gift to Lucky Dog Animal Rescue through your will, trust or other financial plan, you can help create a Legacy of Love, now and well into the future.

When you incorporate charitable giving in your estate planning, you gain personal satisfaction by providing for the people and charities that matter most to you. The staff at Lucky Dog Animal Rescue would love to talk to you about the many opportunities for charitable giving that can save the lives of pets.

Legacy of Love Planned Giving Options:

- Will or Trust
- Retirement Assets
- Life Insurance
- Charitable Gift Annuity
- Outright Gift
- Sit. Stay. Rollover your IRA



LEGACY OF LOVE - *planned giving options*

Will or Trust

Making a gift to Lucky Dog Animal Rescue through your will or revocable living trust is a simple and flexible way to save the lives of pets for years to come. Have you already named Lucky Dog in your will or trust? Please let us know your plans. We'd like to thank you for joining us in our work to Share the Luck.

There are several ways that you can make a gift through your will or trust:

Specific gift: You describe exactly what kind of gift you want to leave to a specific individual or organization and the designated source. If you want to leave a specific dollar amount from a specific source or a particular item (such as a piece of property or a collector's item), this is the type of bequest you would use.

Example – Jeanne states in her will: "I leave my stamp collection to my grandson, Gregory. I leave my beach house to my daughter, Maria. I leave my securities to Lucky Dog Animal Rescue."

Residuary gift: This type of bequest is honored after all other bequests have been made, and all debts, expenses and taxes have been paid.

Example – Susan states in her will: "I give all the rest my property to Lucky Dog Animal Rescue." and taxes have been paid.

Example – Elizabeth states in her will: "I give all the rest, residue and remainder of my real and personal estate to Lucky Dog Animal Rescue."

Contingent gift: This type of bequest is fulfilled if certain conditions are met. For instance, if your primary beneficiary does not survive you, you can indicate your next choice through a contingent bequest.

Example – Robert states in his will: "I give all the rest, residue and remainder of my real and personal estate to my wife, Susan, if she survives me; if not, then 50 percent in equal shares to my children who survive me and 50 percent to Lucky Dog Animal Rescue."



Retirement Assets

A gift of your retirement assets, such as a gift from your IRA, 401(k), 403(b), pension or other tax-deferred plan, is an excellent way to make a planned gift to Lucky Dog Animal Rescue. If you are like most people, you probably will not use all of your retirement assets during your lifetime. Why not allocate the remainder to philanthropic giving and help Share the Luck?

Typically, retirement plan balances are subject to both income and estate taxes. Because Lucky Dog is a nonprofit organization, we won't pay income tax on the distribution nor will the gift be subject to estate tax. Your retirement assets may be transferred to Lucky Dog by completing a beneficiary designation form provided by your plan

custodian. If you designate Lucky Dog Animal Rescue as a beneficiary, the animals will benefit from the full value of your gift because your IRA assets will not be taxed at your death. Your estate can also benefit from an estate tax charitable deduction for the gift.

Your retirement assets may be transferred to Lucky Dog by completing a beneficiary designation form provided by your plan custodian. If you designate Lucky Dog Animal Rescue as a beneficiary, the animals will benefit from the full value of your gift because your IRA assets will not be taxed at your death. Your estate can also benefit from an estate tax charitable deduction for the gift.

LEGACY OF LOVE - *planned giving options*

Life Insurance

You can name Lucky Dog as a primary life insurance beneficiary or as a contingent beneficiary should your other beneficiaries not survive you. After your lifetime, the benefits from your policy pass to Lucky Dog, free of federal estate tax. To make this gift, simply contact your insurance carrier and request a beneficiary form. Here are some benefits to you:

Simple to give: Involves little effort or paperwork

Financial advantage: Continued ownership of your policy

Flexibility: You can change your mind and your beneficiaries at any time

Future tax savings: Removes the asset from your potential gross taxable estate

Legacy of kindness: Your gift will help Lucky Dog continue its lifesaving work

Example: Years ago, Dorothy bought a life insurance policy to protect her family. Her family no longer needed this protection, so she decided to name Lucky Dog as the life insurance beneficiary. After Dorothy's lifetime, the policy will benefit homeless pets through Lucky Dogs' work.



Making an outright gift of a paid-up insurance policy: Another option is to donate your paid-up life insurance policy to Lucky Dog. If the policy has a cash value, Lucky Dog would have the option of either holding the policy until the maturity date or surrendering the policy to receive the policy's current cash value. Here are some benefits to you:

Income tax savings: You're entitled to a current income tax deduction

Future tax savings: Removes the asset from your potential gross taxable estate

Legacy of kindness: Your gift will help Lucky Dog Animal Rescue continue its lifesaving work

Charitable Gift Annuity

You can realize tax savings and reliable annual income while donating to Lucky Dog. Here's how charitable gift annuities work:

You make a donation to Lucky Dog (minimum of \$10,000). You receive fixed annual payments for the rest of your life, at an attractive payment rate.

You receive an immediate charitable income tax deduction, and if you donate appreciated securities to fund your gift annuity, you will enjoy capital gains tax savings as well.

Your gift will benefit you (and someone else, if you choose) now, and save the lives of homeless pets in the future.

One of the reasons that gift annuities are popular is because they are so flexible. Here are the most common options:

Immediate payment annuity: Once you make your donation, Lucky Dog will make annual fixed income payments to you starting immediately.

Annuity that reduces your capital gains taxes: If you have stocks or mutual funds that you have held a year or longer, you can use them to fund your gift annuity. By doing so, you will avoid a significant portion of the capital gains tax.

The remaining gain will be equally allocated over several years of your annuity payments and will not be taxed all at once.

Annuity with two beneficiaries: One of the great things about gift annuities is that they can be set up to benefit two people, making them a great retirement and estate planning tool for couples, whether or not the individuals are married. If either beneficiary passes away, the surviving beneficiary will continue to receive the full annuity payment each year for life.

Deferred payment annuity: The payment rate of an annuity increases with age. If you don't need income immediately, you can defer your first payment for a number of years to a point in the future. You will receive payments at a higher rate.

Lucky Dog can provide a customized illustration of how a charitable gift annuity could benefit you. We'll calculate your payments and tax benefits based on your age and a sample gift amount, without obligation and in confidence.

Lucky Dog offers gift annuities to income beneficiaries age 60 and over. The minimum gift amount is \$10,000.

LEGACY OF LOVE - *planned giving options*

Outright Gift

An outright gift of cash or appreciated property is another easy and wonderful way to contribute to the work of Lucky Dog. Your gift will be put to immediate use, and you will be entitled to a charitable income tax deduction for the full value of your gift.



Sit. Stay. Rollover your IRA.

Turn your life savings into lifesaving.

If you make a contribution to Lucky Dog Animal Rescue through your IRA, you'll be saving the lives of homeless pets and you'll get great benefits, too!

A charitable IRA rollover is a wonderful option for people 70 and a half years of age and older. That's because it allows you to make a gift to the animals – from \$100 to \$100,000 – and the distribution won't count as taxable income. An IRA rollover is also a great option if you don't normally itemize your charitable deductions. Check out the frequently asked questions below to see if an IRA rollover is right for you.

What's a charitable IRA rollover?

A charitable IRA rollover is a direct contribution made from your traditional or Roth IRA to a public charity like Lucky Dog. Your contribution is excluded from your taxable income and can't exceed \$100,000 per year.

Who benefits most from an IRA rollover?

Those with significant assets in an IRA or those who don't deduct charitable gifts benefit the most from an IRA rollover. Charitable IRA rollover distributions count toward required minimum distributions.

Is my IRA rollover gift deductible?

No. The gift from your IRA would be excluded from your income, so there are no additional deductions.

How does my IRA rollover help the animals?

Every gift, no matter how large or small, helps save the lives of homeless pets. When you make a contribution to Lucky Dog from your IRA, you'll be supporting lifesaving adoption programs, no-kill initiatives and more. You'll be helping to Share the luck!

WHY WE GIVE

Our planned giving donors come from all walks of life. While some have a special place in their hearts for kittens, or dogs, they all share a common belief that, together, we can leave a Legacy of Love.

Charlie's Story

When I think about the lasting legacy I want to leave, I cannot help but think of my sweet dog Charlie. He's the reason I became involved in animal rescue. I knew I wanted to adopt a rescue dog for the longest time. I had pictures in my head of finding my best friend. Going hiking and chilling in front of the t.v. Like many, I scoured the internet, looking a picture after picture. Until I saw him. I knew immediately that he was the one. I brought Charlie home from an adoption event late one Saturday afternoon, excitedly showing him our home and all of the toys I had waiting for him. His new food bowl, his bed (mine is always his preference), and our backyard. I immediately thought, he must be so happy, so relieved, he's found his forever home. I wasn't thinking about where he had come from, what he had seen, the support he would need to heal.



I would love to say that Charlie was immediately thrilled with his new home, but this was not the case. He hid behind the couch whenever the tv was on. He would go into the yard and just sit without running or playing. He wouldn't even touch a single toy I had so excitedly purchased. He was a dog who didn't know how to be a dog. I was heartbroken. Not just for him, but for me. I had all these expectations . . . this was not what I signed up for. I didn't know what to do so I started googling. I started reaching out to friends with dogs. And, I found out that one of my friends volunteered at Lucky Dog. She brought her dog over to play with Charlie. She gave me tips on positive reinforcement and anti-anxiety aids like a thundershirt. The change in Charlie over the next few weeks was amazing. The change in me was just as profound. I realized there were millions of dogs out there like Charlie. Dogs who didn't know how to be a dog. Who needed a human to believe in them. And there were humans out there like me who wanted to do the right thing but didn't know how.

I made my first donation to Lucky Dog Animal Rescue in honor of the friend who helped me so much. When I saw how much there was to do on behalf of the animals, I wanted to make a greater impact and began giving monthly. And, that made me start thinking, could this be part of the legacy I leave behind? A legacy of helping animals in need? Of course, I would be leaving most of my estate to my family, but I knew there had to be something more. I wanted to continue to help dogs and cats like Charlie. Dogs and cats who, themselves, would spread love and joy to families -- just as Charlie brought love and joy to me. Working with my estate planner to include Lucky Dog Animal Rescue in my plans brought me incredible satisfaction. I am proud to know that my gift will ensure that dogs like Charlie will have a second chance at life and love.

Rescuing Charlie -- and overcoming our challenges together -- is what brought me to where I am now: supporting the work of Lucky Dog Animal Rescue. Lucky Dog excels as a rescue; providing care and support to their animals throughout the rescue and rehoming process. They are efficient, engaged, and transparent. And the support they provide to adopters -- goes above and beyond. Although there are many wonderful rescues and adoption organizations, Lucky Dog is special. That is why I support them. So does Charlie, my happy, well-fed senior dog - living his best life.



Update on Honey (formerly known as Karen)

Lucky Dog found Honey (formerly Karen) in a shelter in Hawaii on an island without any medical specialists. We knew she had a possible medical issue causing her to pee unusually frequently, but we had no idea what it was. What we did know was that Honey was an extremely happy and energetic 5 month old who deserved a chance at a long and happy life.

We brought her to the DC area and found her two amazing fosters who dealt with doggie diapers and many nights of cleaning up accidents as we worked with our vets to try to determine what her medical issues were. We ran a multitude of tests -- there was no easy way to diagnose Honey -- all the while looking for that unicorn of adopter who would see through Honey's medical issues and recognize the amazing dog she is.

Our efforts were not for naught! After a few months in our care, Honey found her honey!

As her new mom reported: Honey is doing so well. She has had only 2 accidents inside the house in a month! I'd say that's a huge win. And I think one was just nerves because she was in a brand new house. Her new vet loved her so much at our visit, and she was very impressed at how much blood work and tests you all ran to find the answer. My vet believes she has diabetes insipidus which is extremely rare, so she is going to do more research to learn more. She is the happiest, most loving, sweet as can be dog. "

Honey" really fits her. She is great with all other dogs and has a boyfriend in our neighborhood, ZigZag. They play every morning on our walk. She can tear through a bone in no time at all, and she can do the same to stuffed toys and beds!

She is such a beauty too. I take her with me when I run errands and wherever she goes, she gets comments on her perfect size and how beautiful she is! Thanks so much for taking care of her and allowing us to adopt her. She's already brought so much to our life! - Honey's Adopter

Your legacy of love will make it possible for many more stories just like this. We work hard to carefully screen adopters and match them with loving families. The multi-step adoption process includes a phone interview, home visit, veterinary check with families with existing companion animals in the home, and a landlord check.

All of these steps are necessary to ensure a safe forever home and to reduce the potential of the animal being returned. Lucky Dog continues to connect with our adopters regularly after adoption for support, adopters, volunteers and donors are a vital part of our Lucky Dog community.



ESTATE PLANNING FOR DOGS AND CATS

Our dogs, cats and other pets are so close to our hearts, it's difficult to think about the day when they'll no longer be with us. But what if something happens to us first, and we're not around to take care of them? When preparing your will or trust, what is the best way to plan for your pets' future after you're gone, and what should you include in your will?

In the event that you pass away first, your animals will need immediate care and love. We've compiled some helpful tips for estate planning with pets in mind.

Arranging for caregivers for dogs, cats and other pets. You'll want to choose both emergency and permanent caregivers for your pets. Here are some tips:

Ask a few trusted friends or family members to act as emergency caregivers. And you'll want to arrange for more than one caregiver, just in case someone isn't available. Give them feeding and care instructions for your pets, contact information for your veterinarian and a key to your house.

You'll want to let the rest of your family, friends and loved ones know how many pets you have, and that contact information for your emergency caregivers is available. Keep this contact information in your wallet and somewhere in your home where it's easy to find

To ensure long-term care for your four-legged friends, you'll need to name a permanent caregiver. Be sure to choose someone you know will be able to provide your pets with a good home, someone who can give your pets the kind of attention and care they're used to.

If you don't have someone in mind as a permanent caregiver, give detailed instructions to your emergency caregivers regarding how to find a new home for your pets. If you adopted a pet from an organization, be sure to check your adoption agreement for clauses requiring your pet to be returned to their care. You can also discuss leaving your pet to Lucky Dog to find them a new and loving home also, as a part of your legacy gift.

Talk about your wishes and the needs of your pets with your potential caregivers. If you have multiple pets, decide whether they should stay together or be placed with different caregivers. Keep in touch with your caregivers, so that you can make other arrangements if their circumstances change and they are no longer available to serve in that capacity.

When designating a permanent caregiver, you should include a backup option. Although it may seem like a good idea, avoid naming an organization as your permanent caregiver (unless



otherwise stipulated in your adoption agreement). While some animal welfare organizations may have temporary space available, they generally can't offer the kind of long-term care your animals will need.

Your pets are your companions, and they're used to living in your home. Think about placing them where they'd be the most comfortable.

Provisions for pets in a will or trust

You can help to ensure that everything goes smoothly by incorporating your wishes for emergency and long-term care for your animals in your will or trust. Making formal arrangements will bring you peace of mind and reassurance that your pets will be properly looked after. Remember, it's important to set up emergency care as well as permanent care for your pets, since long-term arrangements can take some time to implement and your pets will need immediate attention in the event that something happens to you.

While preparing your estate planning trust, you'll want to include authorization for the use of funds from your estate for your pets. This money can be used for their care and any other costs that may arise, such as the cost of transportation to their new home. Consider setting up a trustee, which can add an additional layer of oversight and care for your animals.

Planning provisions for your pets requires some important decision-making. If you have any questions, consult a legal expert who can assist you with deciding what to include in your will. That person can also help you figure out what kind of estate planning with your pets will be most effective. And don't forget to leave copies of your will or trust with your executor and chosen caregivers.

INFORMATION FOR ADVISORS



In your work as an advisor, you value professionalism, integrity and honesty, and you take great care when serving your clients. At Lucky Dog, we share your values and take the same care when it comes to helping our donors plan charitable gifts to Lucky Dog. Please use the information below as you help your clients with their charitable giving plans, and feel free to contact us for more information or assistance.

Legal Name: Lucky Dog Animal Rescue

Address: 5159 Langston Blvd, Arlington, VA 22207

LuckyDogAnimalRescue.org

Lucky Dog Animal Rescue is a 501(c)(3) registered nonprofit. Tax ID# 30-0559037

For additional information to share with your client, please download our Create Your Legacy of Kindness brochure.

We understand that gifts to organizations like Lucky Dog Animal Rescue can be an important part of your clients' overall financial and estate plans. We welcome the opportunity to work with you to ensure that your clients find the charitable plans that meet their needs. We would be happy to create an illustration for you to share with your clients. Please do not hesitate to contact us if we can help.

Bequest Language: "I give to Lucky Dog Animal Rescue, a Virginia corporation with its principal offices at 55159 Lee Hwy, Arlington, VA 22207, (the sum of \$ ___) (all or ___ percent of my residual estate) to be used for its general purposes. "Please contact Stephany Smith, Director of Development, for increased information and special requests: StephanyS@LuckyDogAnimalRescue.org

LUCKY DOG ANIMAL RESCUE

Our Mission

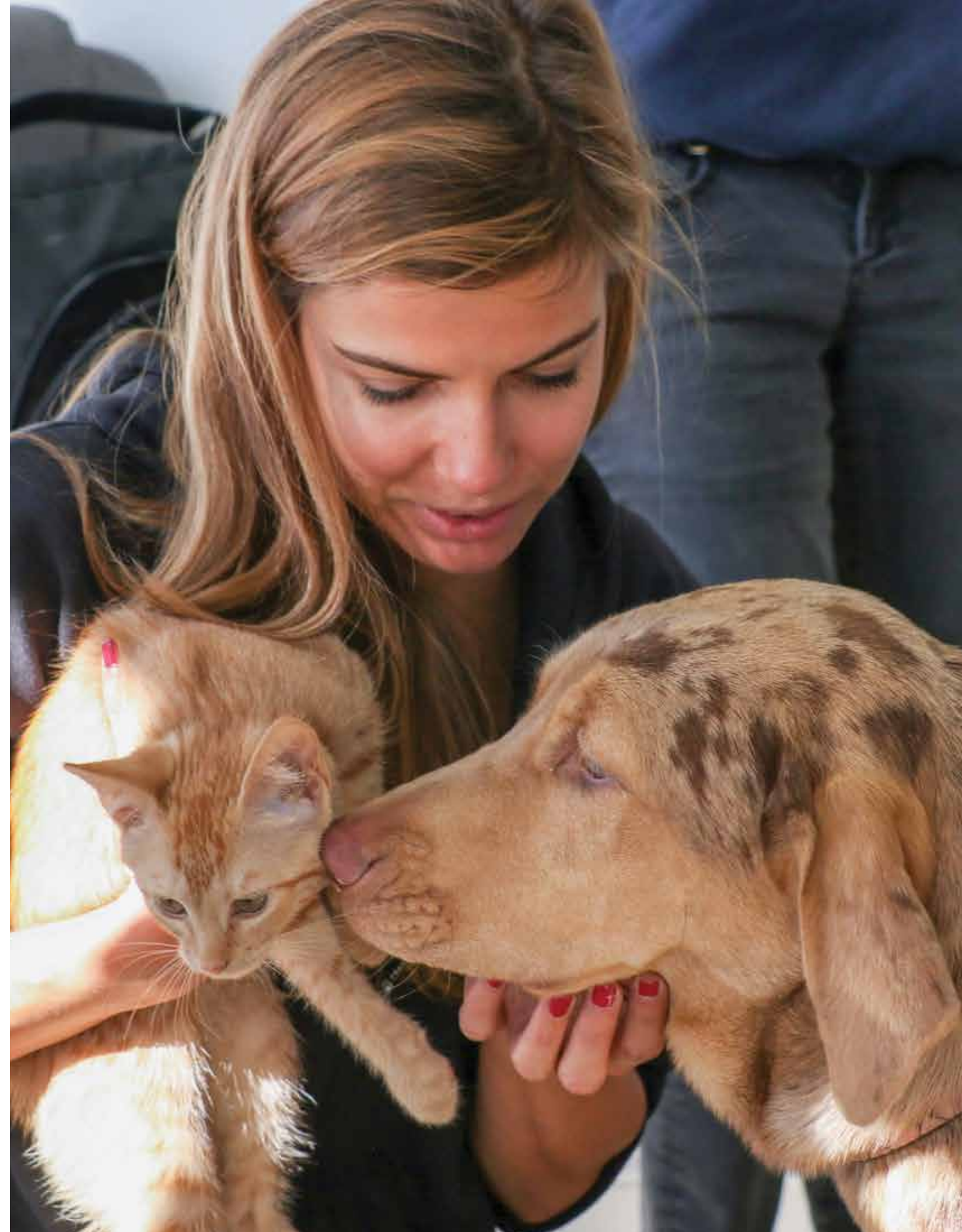
Lucky Dog Animal Rescue is a volunteer-powered nonprofit dedicated to rescuing homeless, neglected, and abandoned animals from certain euthanasia and finding them loving forever homes. We educate the community and all pet parents on responsible pet parenting, including the importance of spay/neuter, obedience training, and good nutrition.

Our Vision

We envision a world where all animals are spayed and neutered and where all pets have responsible families and loving homes.

Our Philosophy

Successful Lucky Dog adoptions depend on multiple and strong relationships with committed volunteers, foster homes, local veterinarians, trainers, and boarding facilities. Through these relationships we are able to rescue hundreds of animals every year, provide them with loving temporary care, and find them well-matched, carefully screened forever homes.





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Arlington, VA 22207

Primary Phone Number: 703.237.5327
Fax Number: 202.380.9077

InSight
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