



CHARITABLE GIFT ANNUITIES



THE MISSION

of North Shore Animal League America has remained constant and true for more than 60 years - to RESCUE, NURTURE, and ADOPT as many dogs, cats, puppies, and kittens as possible. As the world's largest no-kill pet rescue and adoption organization, we're doing just that. Since our founding in 1944, the League has placed close to one million pets into carefully screened, loving homes.



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A charitable gift annuity is a simple plan that allows you to provide long-term support for North Shore Animal League America and obtain significant ongoing income and tax benefits for yourself, a family member, partner, or friend.

GIFT ANNUITIES OFFER SEVERAL BENEFITS

- 🐾 Increased spendable income
- 🐾 An income tax charitable deduction
- 🐾 Reduced capital gains taxes if appreciated securities are used
- 🐾 Reduction of your taxable estate
- 🐾 Most importantly, the satisfaction of knowing that you have helped ensure the future of North Shore Animal League America!

To establish a gift annuity, you simply make an irrevocable **minimum** donation of \$10,000 (if one beneficiary) or \$20,000 (if two beneficiaries) in cash or marketable securities. In return North Shore Animal League America pays you and/or your designated income beneficiary(ies) a fixed annuity for life. The amount of the annuity and the tax deduction depend on your age and/or that of your chosen beneficiaries. (Our minimum age is 60.) After the death of the beneficiary(ies), the League will use the remainder of your gift in support of its work.

Payments are backed by the assets of North Shore Animal League America, and the many tax benefits available make a gift annuity an especially smart financial decision. As with a commercial annuity, a portion of each payment is considered to be a tax-free return of principal. If you use appreciated securities to fund a gift annuity, you avoid a significant portion of the capital gains taxes that would have been due if you sold the securities. The remaining taxable gain can be spread over your life expectancy as a part of your annuity payments. And of course, you also receive an income tax charitable deduction for the future value of your gift to the League.

AN EXAMPLE:

Jane, age 65, is concerned about having steady income during her retirement, but wants to make a significant gift to the League. She owns securities purchased long ago for \$5,000 which are now worth \$40,000 but only generate dividends of \$800 per year. Jane would like to sell the stock and reinvest the proceeds to increase her income, but doing so would produce a taxable gain of \$35,000. After paying the capital gains tax of \$5,250 (\$35,000 x 15%), Jane would be left with only \$34,750 to invest or donate.

If Jane uses her stock to fund a gift annuity to benefit North Shore Animal League America, she will receive an annual return of 6%, or \$2400 annually, \$1600 more than she was receiving from her stock dividends. When she makes her gift, she will receive a \$15,026.80 income tax charitable deduction, her capital gains tax liability will be reduced, and the remaining gain will be passed through the annual payments, further increasing her tax savings and rate of return.*

And not only will she receive an increased, guaranteed income for life, but she will be able to make a truly significant gift—a wonderful outcome for both Jane and the League!

*This example is for illustrative purposes only and may not reflect your actual situation.



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For more information on how to make a significant gift to North Shore Animal League America and receive income for life, please contact the Office of Planned Giving at 516-812-7218 or email to:
plannedgiving@nsalamerica.org
for a free, confidential gift annuity proposal.