



# GIFTS OF RETIREMENT PLANS



## 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.



north shore  
animal league  
america®

Saving Pets is Our Passion™

16 Lewyt St. Port Washington, NY 11050  
516.812.7218 • [www.animal-league.org](http://www.animal-league.org)



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## GIFTS OF RETIREMENT PLANS

A gift to North Shore Animal League America through a retirement plan [IRA, 401(k), 403(b), Keogh or other qualified retirement plan] may be one of the easiest and most tax effective ways to help ensure a strong future for the League and the thousands of homeless pets we help each year. By using retirement plans rather than other assets for a planned gift to the League, you will also increase the percentage of assets to your loved ones.

Retirement plans may be taxed as much as 75% if you leave them to individual beneficiaries other than a spouse. This is because retirement plan assets transferred at death to non-spousal individual beneficiaries (such as children) may be subject to estate and state and federal income taxes. Even a spouse is subject to income taxes. Naming a tax-exempt organization such as North Shore Animal League America as a beneficiary or contingent beneficiary of all or a portion of your plan may allow you to avoid both estate tax (if your estate is subject to estate taxes) and income tax that would be due on tax-deferred plans if distributed to individual beneficiaries.









If you decide to include the League in your estate plan you should consider using retirement plan assets to fund your charitable gift and leave other assets to your individual beneficiaries (see the chart below). To name North Shore Animal League America as a beneficiary, simply list the League on your plan's beneficiary designation form. Our legal name, address and taxpayer identification number is:

**North Shore Animal League America**  
**16 Lewyt Street**  
**Port Washington, NY 11050**  
**Tax ID# 11-1666 852**

Because retirement plan rules are complex, you should also consult your financial or legal advisor for current tax laws applicable to you and your estate.



### FOR EXAMPLE:

	 Gift to Family (Non-Spouse)	 Gift to the League
 Retirement Plan Assets	\$100,000	\$100,000
 Less: Estate Taxes	(\$45,000)	(0)
 Less: Income Taxes	(\$19,000)	(0)
 Net Amount Available for Gift	\$35,750	\$100,000

(Assuming the total estate is taxable and that 45% estate tax and 35% income tax brackets are applicable).

## CHARITABLE GIFTS OF RETIREMENT PLANS

*For more information about Gifts of Retirement Plans, please contact the Office of Planned Giving at 516-812-7218 or email to:*  
***plannedgiving@nsalamerica.org***