

# LEGACY GIVING GUIDE

Creating a lasting impact for  
Southwest Michigan's animals



**SPCA**  
southwest michigan



# **A LEGACY OF CARE** for the animals you cherish

For decades, SPCA of Southwest Michigan has provided shelter, medical care, and second chances to animals in need. A legacy gift ensures this lifesaving work continues for generations to come.

By including SPCA of Southwest Michigan in your estate plans, you create a meaningful legacy of compassion—while maintaining control of your assets during your lifetime.

## **WHY CONSIDER A LEGACY GIFT?**

- Provide long-term stability for vulnerable animals
- Support shelter operations, medical care, and adoptions
- Leave a legacy aligned with your values
- Potentially receive estate tax benefits (consult your advisor)
- Create a flexible gift that can be updated over time

## WAYS TO LEAVE A LEGACY

### 1. INCLUDE SPCA IN YOUR WILL OR TRUST

One of the simplest ways to make a lasting impact is through a charitable bequest. You may leave a specific dollar amount, a percentage of your estate, a particular asset, or the remainder of your estate after other gifts are fulfilled.

### 2. NAME SPCA AS A BENEFICIARY

- Retirement accounts (IRA, 401(k), 403(b))
- Life insurance policies
- Donor-advised funds
- Bank or investment accounts (payable-on-death designation)

### 3. GIFTS OF STOCK OR APPRECIATED ASSETS

Donating appreciated securities may allow you to avoid capital gains tax and potentially receive a charitable deduction while making a larger impact.

## SAMPLE BEQUEST LANGUAGE

“I give to SPCA of Southwest Michigan, a Michigan nonprofit organization, the sum of \$ \_\_\_\_\_ (or \_\_\_\_\_ % of my estate, or the residue of my estate) to be used for its general charitable purposes.”

## LEGACY SOCIETY

Supporters who include SPCA of Southwest Michigan in their estate plans may be invited to join our Legacy Society.

Members help ensure the long-term future of animal welfare in our community.

## CONTACT INFORMATION

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The information provided in this guide is for educational purposes only and is not intended as legal or tax advice. Please consult your attorney or financial advisor when making estate planning decisions.