

A Lifetime of Caring



A Legacy of Compassion A Guide to Estate Planning

ANIMAL ALLIANCE
OF CANADA



Animal Alliance of Canada
is committed to the protection of
all animals and to the promotion
of a harmonious relationship
among people, animals and
the environment.

Dear friend of the animals

Since 1990, Animal Alliance of Canada has been protecting our fellow creatures. We are the voice of the voiceless, making positive change through education and legislation. Our animal saving work is made possible, thanks only to the generous and on-going support of caring people like you.

You can continue your “Lifetime of Caring” after your passing by remembering in your will the animals and the animal protection organizations which have earned your trust.

You can use thoughtful estate planning – regardless of the size of your estate – to go on helping animals. This booklet will help you plan a “Legacy of Compassion.”



*Thank you for considering
Animal Alliance*

Planning your legacy

PLANTING SEEDS FOR THE FUTURE

All of us at Animal Alliance of Canada thank you for your kindness and support.

Having lived a lifetime of caring for your fellow creatures, you can leave a legacy of compassion to them through your estate. And, with thoughtful estate planning, you can help perpetuate the ideals and organizations you believe in.

Contemplating our passing can be difficult. It is important to leave a will with clear instructions about how to care for your beloved companion animals and distribute your worldly goods.

With planning, you can insure that your loved ones – including your companion animals and those organizations you helped throughout your lifetime – are supported even after your passing.

Consulting a qualified estate planner or lawyer can help you decide how best to include compassionate giving in your overall estate planning. With your final wishes written down, your family, friends, or executor will have no difficulty respecting and fulfilling your decisions. Preparing a will will also help insure that your estate is not unnecessarily depleted by legal fees and taxes.

Making a will should not be a one time event. Experts recommend that you review your will once a year — or whenever an important family event takes place (births, deaths, marriages, etc.) — to insure that your plans accurately reflect your most current wishes.



Animal Alliance of Canada

MAKING A DIFFERENCE

Animal Alliance of Canada works for a harmonious relationship between people, animals, and the environment.

Animal Alliance of Canada has been protecting animals since 1990. Our focus on permanent, legislative solutions to the threats facing all animals makes Animal Alliance unique in Canada. Our “alliance” includes dedicated volunteers, professionals, and organizations with expertise in animal protection, environmental, and social justice issues. Our animal protection work occurs at local, national, and international levels.

Your estate planning will enable you to leave a legacy of compassion while allowing for the full use of your assets during your lifetime.

There are many forms of bequests. Your estate planner can help you decide how best to care for your family and friends, your beloved companion animals, and the organizations you would like to support.

Types of bequests include:

- ◆ **General bequests:** a dollar amount is left.
- ◆ **Specific bequests:** an item of property is left.
- ◆ **Percentage bequests:** a percentage of the value of the estate is left.
- ◆ **Residual bequests:** an organization receives the value of the estate left after specific amounts have gone to other beneficiaries.
- ◆ **Contingent bequests:** an organization receives the value of the estate remaining after the death of the primary beneficiaries.
- ◆ **Appreciated Property Gifts:** stocks, bonds, mutual funds, or real estate properties.
- ◆ **Life Insurance Policies:** naming an organization as a beneficiary of a life insurance policy allows you to support the organization of your choice without using capital.
- ◆ **Other Special Gifts:** some pension plans, individual retirement savings plans, and deferred compensation plans allow you to name an organization as a beneficiary.

Estate Planning Checklist

To make sure that your instructions are carried out properly after your passing, inform those closest to you about your will. The following check list will help you prepare:

PLANNING FOR YOUR ESTATE:

- Leave specific, organized instructions for the disposition of your estate.
- Prepare lists of property that has both monetary and sentimental value.
- Gather together and keep in a safe place all financial and legal documents relevant to your estate and a list of your animals' guardians.
- If you have a Living Will or a Health Care Power of Attorney, place copies with your other important papers.
- Make a list of the advisors who will administer your estate, and let them know where all the relevant documents are kept.
- Specify preferences for funeral arrangements.

PLANNING FOR YOUR COMPANION ANIMALS:

- Prepare written instructions about the care of your companion animals, including medical information and name and phone number of their veterinarian.
- Select a trusted friend or family member to act as a guardian for your companion animals, and provide money in your will to cover any expenses. Discuss your intentions with the prospective guardian and confirm that he or she is willing to take on the responsibility. Name a successor guardian in case the primary guardian cannot care for your animals.
- Carry a wallet card that identifies your animals and their names, addresses and telephone numbers of your animals' guardians so they can be called in case of an emergency.
- Inform your heirs, family members, and the executor of your estate about your animals' guardians and how to reach them.
- Give instructions for immediate actions to those whom you are entrusting with your estate particularly provisions for the care of your animal companions.

This booklet is designed to give you a brief overview of some of the issues you should consider when planning your estate.

For more information on planning your legacy of compassion, please contact your lawyer, financial advisor, or a qualified estate planner.

There are many ways you can support Animal Alliance during your lifetime, and afterward. The generous and ongoing support of people like you enables us to fight for the animals wherever our help is needed. Considering Animal Alliance of Canada in your estate planning will help us continue that fight into the future.

Should you decide to include Animal Alliance in your current or future plans for compassionate giving, you have our heart-felt gratitude.

Whatever form your gift takes, we suggest the following language be included in your will:

**“To Animal Alliance of Canada,
221 Broadview Avenue, Suite 101, Toronto, Ontario, M4M 2G3**

I bequeath

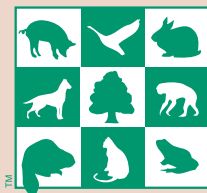
for the general purposes of the organization.”



*Thank you for your kindness and compassion
on behalf of the animals.*

*For more information about Animal Alliance —
what we do or how you can help us —
please contact us.*

*Animal Protection through
Education & Advocacy*



**ANIMAL ALLIANCE
OF CANADA**

221 Broadview Avenue, Suite 101

Toronto, Ontario M4M 2G3

T/ 416 462-9541

F/ 416 462-9647

E/ contact@animalalliance.ca

www.animalalliance.ca