



an **SDF** legacy:

HOW YOU CAN JOIN OUR GUARDIAN COMMUNITY

We deeply appreciate your consideration of a planned gift to the Search Dog Foundation (SDF) and encourage you to meet with your financial planner to determine which type of estate gift is the best fit for you, your family and your charitable goals. Below are some standard vehicles through which you can make a planned gift to SDF. Of course, we stand by to assist and answer any questions you have and look forward to welcoming you to this very special family of supporters!

BEQUESTS

One of the most popular and simplest types of gifts in an estate plan is a bequest. Simply designate a specific dollar amount, a specific asset, or a percentage of the total value of your estate to the Search Dog Foundation in your will. If you already have a will, a codicil (amendment) can easily be added to include SDF as a beneficiary. Specific instructions on how to prepare and execute a will or codicil can be provided by your accountant, attorney or estate planner.

The sample language provided below can be used to add or update your plans to include the Search Dog Foundation:

I give, devise and bequeath to the National Disaster Search Dog Foundation (Tax ID #77-0412509), a 501(c)(3) nonprofit organization, with headquarters at 6800 Wheeler Canyon Road, Santa Paula, CA 93060, the sum of \$ _____; or _____% allocation of the residual of my estate.

AMENDING YOUR EXISTING REVOCABLE OR IRREVOCABLE TRUST

If you already have a trust established, you can add SDF as a beneficiary. Please refer to the sample language above to amend your existing trust or will.

RETIREMENT ACCOUNTS (IRAS AND 401K'S)

You can make SDF the beneficiary of your IRA or 401k and avoid many tax consequences.

GIFTS OF REAL PROPERTY

Real estate values have increased greatly in recent years and substantial tax benefits can be achieved when you make this type of gift. When you make an outright gift of real estate, you obtain an income tax charitable deduction equal to the property's full fair market value, instead of the lower cost basis. There are many other ways to make a real estate gift as well.

LIFE INSURANCE

If you own a life insurance policy that is paid in full and your family no longer needs the policy's protection, you can designate SDF as the new owner of the policy and receive an immediate tax deduction.

CHARITABLE GIFT ANNUITY

A charitable gift annuity provides you (or a loved one) with a permanent annual income for life based on the gift you designate to SDF. It is one of oldest and most beneficial ways to make a charitable gift. It requires a minimum contribution, which can be added to at any time, and is partially tax deductible. Over a period of years, a portion of each payment to you is considered a nontaxable return of your investment in the gift.

CHARITABLE REMAINDER TRUST (CRAT)

A charitable remainder trust delivers a fixed income amount to you that you determine. The amount remains fixed each year regardless of the investment performance. The income payment is mandatory and the principal may be invaded to satisfy the requested payout. No additions to the principal may be made after the trust is established.

CHARITABLE REMAINDER UNITRUST (CRUT)

A unitrust delivers a variable income to you based on the performance of the investment. It generally produces a higher guaranteed income but a smaller tax deduction. It is helpful in keeping up with inflation if the trust value continues to grow. The Unitrust allows for additional contributions.

CHARITABLE REMAINDER LEAD TRUST

A charitable remainder lead trust is the opposite of a CRAT or CRUT. Instead of receiving income during your lifetime, the charity receives this annual income, and upon your passing, the principal goes to your heirs.



letter of intent for estate gift to the **SEARCH DOG FOUNDATION**

Founded in 1996, the National Disaster Search Dog Foundation (SDF) is a 501(c)(3) nonprofit, non-governmental organization based in Santa Paula, CA. SDF's mission is to strengthen disaster response in America by producing highly skilled canine search teams to search for missing persons and victims of natural and man-made disasters. The first of its kind in the U.S., SDF recruits rescued dogs, gives them ongoing professional training, and partners them with firefighters and other first responders nationwide. SDF offers this lifesaving resource at no cost to fire departments or task forces, providing emergency response personnel with a critically important asset they could not otherwise afford.

SDF's **Guardian Endowment Fund** was established with gifts received in response to the deployment of our teams to the September 11, 2001, World Trade Center tragedy. Since then, over 300 caring individuals throughout the country have included SDF in their estate plans. Together, these Estate Donors form the *Guardian Endowment Community*.

ESTATE GIFT INFORMATION

I/we desire to provide for the future well-being of the Search Dog Foundation (SDF) through a provision in my/our estate plan(s). With this letter, I/we am/are informing the Search Dog Foundation (SDF) of our/my intention. I/we understand that this future commitment can be revoked or modified by me/us at any time, for any reason.

Name (Mr./Ms./Mrs.)

Name (Mr./Ms./Mrs.)

Address

City State Zip

Phone Email Address

I/we have made a provision to leave a legacy gift to the Search Dog Foundation through my/our:

- Will Retirement plan or IRA Living Trust Life Insurance Policy Other*

**We will contact you to learn more and discuss the details of your gift*

For long-term planning purposes only, I/we wish to inform the Search Dog Foundation (SDF) that the current value of my/our future gift is \$

(This amount is kept strictly confidential. If your gift is a percentage of your estate, please indicate the approximate value). I/we understand that by stating an amount, my/our estate is not legally bound by this statement, and I/we may choose to add, subtract, or revoke this gift at any time.

GIFT RECOGNITION

We would be honored to celebrate your generosity and timeless commitment to strengthening disaster response in America.

The Search Dog Foundation may publish my/our name(s) in publications and add my/our name(s) to any roster or lists acknowledging their estate donors.

I/we wish to remain anonymous.

Name (Print)

Name (Print)

Name (Signature)

Name (Signature)

Date

Please return this form to:

Search Dog Foundation

Attn: Estate Manager

6800 Wheeler Canyon Road

Santa Paula, CA 93060

Phone: (888) 459-4376

www.SearchDogFoundation.org

Rescue@SearchDogFoundation.org

The Search Dog Foundation (SDF) is a charitable, nonprofit 501 (c)-3 organization, and our Tax ID #77-0412509

Thank you for embracing SDF's mission of service through your estate gift.