



Melissa Gibbons
Director of Foundations
& Corporate Relations

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Leave a Gift to Save the Chimps through your IRA and other Managed Accounts

Naming Save the Chimps (STC) as a beneficiary of your IRA/other retirement plan, brokerage accounts, life insurance policy, bank accounts, CD, and any other managed account is an easy, fast, and tax-wise way to make a future gift to Save the Chimps to support our mission to provide lifelong refuge and exemplary care to chimpanzees in need.

Retirement accounts are subject to multiple types of taxes and therefore are the best assets to leave to a charity as 100 percent will be paid out without taxes taken out. So don't leave your IRA to the IRS. These legacy gifts play a significant role in supporting our mission to provide lifelong refuge and exemplary care for chimpanzees in need.

Benefits of this gift

- You do not need an attorney, simply complete your managed account beneficiary form. You can change the provisions at any time if your circumstances change.
- These assets will not be included in your taxable estate if designated to STC. Your gift is fully deductible for federal estate-tax purposes and may help reduce the tax burden for your heirs.
- Avoid the double taxation your retirement savings would incur if you designated your heir as beneficiary. You may be able to escape both income AND estate taxes levied on the residual left in your retirement account. Because STC is a non-profit organization, we won't pay income tax on the distribution, nor will the gift be subject to estate tax. The entire amount comes to us, and your heirs will benefit from a reduced estate tax burden.
- Continue to take withdrawals during your lifetime.
- Change STC as beneficiary if your family circumstances change.

How to do this gift

- Request or download a beneficiary form from your account manager.
- Name STC as a partial, contingent, or sole beneficiary of your account using **Legal Name: Save the Chimps, Inc. and/or Federal Tax ID #: 65-0789748**
- If you are married, you will need to complete a spousal waiver form.
- With a 401(k) ask if there is an extra step.
- Naming a beneficiary of your retirement account in your will is not sufficient. You must complete your retirement account beneficiary form as this override what is in your will.
- Most importantly, notify STC that you have named us, so we are sure to receive your gift and have on file, as many retirement account managers are delaying the disbursement.



Daphne



Notify Us!

Notifying Save the Chimps of your intended gift will help us plan for the future care of chimpanzees in need. Complete and sign the attached Legacy Confirmation Form to get started.

savethechimps.org/planned-giving

Send signed form via email to:
mgibbons@savethechimps.org

OR

Post mail to:
Save the Chimps
PO Box 12220
Fort Pierce, FL 34979

Have Questions? We're here to help!

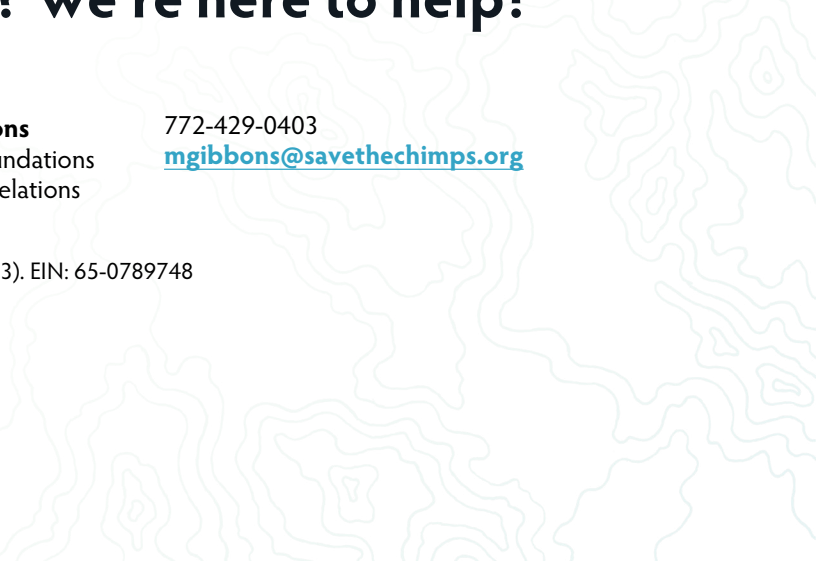


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Save the Chimps, Inc. is a registered 501(c)(3). EIN: 65-0789748

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Confidential Legacy Intention Form

Welcome to the Carole Noon Legacy Society—our way of recognizing friends like you who are providing for the future care of chimpanzees through an estate gift to Save the Chimps.

Your support provides the life-long refuge and exemplary care for rescued chimpanzees.

Legacy gifts from generous supporters have been a vital source of funding for Save the Chimps. Membership in the Legacy Society involves no dues or obligations. It simply allows us to thank and recognize you for your intended gift and helps us plan for our financial future to carry out our mission.

First Name(s)

Last Name(s)

Date of Birth (MM/DD/YYYY)

Street Address

Apt. #

City

State

Phone

Email Address

Preferred Method of Contact

Phone

Email

Your Gift May Inspire Others to Give.

We hope you are willing to be acknowledged in Save the Chimps publications with other members of the Carole Noon Legacy Society.

How would you like to be listed in Save the Chimps publications?

Please select only one of the following and provide a name.

Please list my name as:

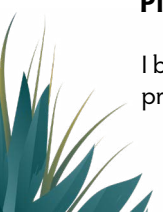
My gift is IN HONOR of:

My gift is IN MEMORY of:

I prefer to remain anonymous.

Please be sure to use the following language in your plans:

I bequeath _____ (dollar amount or % of estate) to Save the Chimps, Inc., a nonprofit organization, with its principal business address at PO Box 12220 Fort Pierce, FL 34979. EIN/Tax ID: 65-0789748





Additional Information About Your Gift

Details about your gift help Save the Chimps plan for its future, even for amounts that may change over time. Your information is confidential and is for our records only. This form is not legally binding upon you or your estate as to the ultimate receipt or value of any future gift.

I/We have included a donation to Save the Chimps in my/our estate plan.

Type of Gift

Check all that apply and please estimate the value of each gift in today's dollars:

Gift from my Will or Living Trust

Est. Value \$

Retirement Plan/IRA Beneficiary

Est. Value \$

Charitable Remainder Trust

Est. Value \$

Beneficiary Other Managed Accounts

Est. Value \$

Other Asset(s)

Est. Value \$

Is your gift contingent?

A **Contingent Gift** comes to Save the Chimps only if the other named beneficiaries do not survive you.

No Yes

If you answered YES to the above question, please explain below:

Save the Chimps wishes to assure you that your statement of intention does not constitute a legal obligation and will not be legally binding in any way on you, your heirs, or your estate. Further, Save the Chimps understands that the size of your future gift may be different from the amount estimated above.

Signature(s) *You may also type your name(s) in the box(es) below to sign.*

Name

Date

Name

Date

Please return this form by post mail to:

Melissa Gibbons, Director of Foundations & Corporate Relations, Save the Chimps, PO Box 12220, Fort Pierce, FL 34979

Or via email to:

mgibbons@savethechimps.org

