



**Melissa Gibbons**  
Director of Foundations  
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## Donor-Advised Funds

Give through a Donor-Advised Fund to provide the life-long refuge and exemplary care for rescued chimpanzees.

Manage your charitable giving through a Donor-Advised Fund (DAF). Establishing a DAF is like creating your own personal charitable foundation, but without the administrative work. It's a simple process of depositing the amount you would like to donate into your DAF and then directing those funds at any time to the charity of your choice like Save the Chimps.

### Benefits of this gift

- **Control.** You have advisory privileges over the fund and can recommend distributions to support qualified charitable organizations like Save the Chimps.
- **Tax advantages.** You may claim a federal charitable income tax deduction in each year you contribute to your fund. There is no capital gains tax due on appreciated assets, and the gifts may reduce your gross taxable estate.
- **Setting up a (DAF) will provide you a charitable deduction now and allow you to designate beneficiaries later.**
- **Flexible payouts.** You can distribute funds to Save the Chimps at any time, on your own timetable - no more year-end rush.
- **Simple record-keeping.** Your fund manager handles the administration of your donations, including your receipts and paperwork.
- **You incur none of the legal, administrative, or reporting requirements with a donor advised fund that you do with a private foundation, and the assets in your fund may grow tax-free.**

### How to do this gift

- **Work with a financial institution (such as Fidelity, Schwab, Vanguard) or Community Foundation to create a fund in your name or in the name of a loved one.**
- **You make an irrevocable gift to the fund. Your fund's manager may have a minimum initial gift size of \$5,000 or more.**
- **You receive a charitable tax deduction when you deposit money into the fund.**
- **Recommend distributions from your fund to Save the Chimps and any other charities.**
- **Your Donor-Advised Fund is invested and may grow over time.**
- **Your financial institution administers the fund, writes the checks, and makes the distributions in your fund's name. You receive regular statements from the fund's administrator documenting your distributions, fund balance, and tax deductions.**



Daphne

## Notify Us!

To ensure you are listed as the donor of record and to let us know to expect your gift, you can email:

[mgibbons@savethechimps.org](mailto:mgibbons@savethechimps.org)

**For more information or should you have any questions, please contact:**



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

[savethechimps.org](http://savethechimps.org)



# 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:**

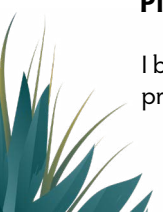
**My gift is IN HONOR of:**

**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](mailto:mgibbons@savethechimps.org)

