



### **Create your Animal Legacy with Estate Planning**

The below is some very basic information in the event you are not yet familiar with estate planning. It should not substitute for legal or financial advice from your trusted professionals.

Estate planning means that you designate in your will or trust how your assets will pass to those about which you care. If you don't leave a will or trust, state law determines how your assets will be divided. Many people think that wills are reserved for the wealthy, but anyone with a home or a family should have a will, and anyone at any income level can leave something for your favorite causes.

What you put in your will is what people will remember you by. Your will gives you the opportunity to transfer the values that are important to you. One of the best ways to leave a legacy like this is to make charitable bequests in your will.

West Place Animal Sanctuary ("WPAS") relies on donations and grants to continue our lifesaving work. You can help us sustain our programs and save even more animals by including West Place Animal Sanctuary in your estate planning. Please call **401-228-6800** for more information. Should you need our Federal Tax ID, the number is 14-2005606 and our complete contact information is at the bottom of the page.

#### **What is estate planning?**

**The first thing you need to do when planning a will or trust is to get sound legal advice.** When the time comes for your will to be probated, you won't be here to correct any misunderstandings. To avoid trouble for your heirs, be sure to seek counsel of an attorney who specializes in probate and estate planning, and if you have a financial advisor, they should also work in conjunction with you and your attorney.

**Update your will or trust often.** An old will can be almost as bad as none at all. Life events, tax law changes, a move to another state, or changes in the nature and value of your assets can also affect your will. To make sure your wishes are followed, keep your will or trust updated.

**Designating the funds can be done two ways:** a fixed dollar amount or a percentage of your estate.

**Your gift can be contingent.** That is, the funds would go to an individual unless for a certain reason they would not, and then if not, they would be paid to WPAS.

**You can create a trust** which would pay an income to an individual for life, with the remaining principal to be given to WPAS.

**A gift without restrictions is usually the most useful** because it allows us to apply the funds to our most pressing needs. But you also have the right to restrict your gift by specifying in your will how the funds are to be used. Some people wish to designate funds to a specific program. If you wish to do so, it would be best to consult us before you execute your will to make sure the conditions are ones we will be able to meet.

We thank you in advance for your consideration of this serious way to give. We are happy to answer any questions or to work with you in providing any information you need to achieve your wishes. Please feel free to contact our Executive Director directly at:

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