

## MaxFund Estate Planning Letter

[Address]

[Date]

Dear Friend of MaxFund,

The MaxFund Animal Adoption Center has worked on educating the community on the importance of animal health and safety for over 30 years. Located in the heart of Denver, MaxFund is a true no-kill shelter that has stayed true to its mission of saving lives of injured strays with no known owners and finding them forever homes once they were adoptable.

By making a gift to MaxFund through your will, trust or other financial plan, you will help ensure that we will be here in the future continuing to save the lives of countless homeless pets and giving back to our amazing community. We will always be committed to animal welfare and work tirelessly toward our dream of a world where every pet has a home.

Please know as well that if you need a loving caretaker for any of your pets that may outlive you, MaxFund will welcome them with open arms as their guardian. We understand more than most that pets are family and we want to give you peace of mind during your estate planning.

There are several ways that you can make a gift to MaxFund through your will or trust. Below is our nonprofit tax ID and simple bequest language that can be used in planned giving preparation. We've also included some samples of more specific ways you can name MaxFund as a beneficiary on the next page.

**Tax ID#** 84-1116882

**Bequest Language:** "I give to MaxFund Inc., a Denver corporation with its principal offices at 720 West 10th, Denver, 80204, (the sum of \$ \_\_\_ ) (all or \_\_\_ percent of my residual estate) to be used for its general purposes."

If you have any questions about including MaxFund in your estate planning, please contact [name] at [phone] or [email].

Supporters of the MaxFund and their generosity have helped us speak for those that have no choice and no voice. We truly believe that every animal has a special place on earth and deserves a second leash on life. Thank you for helping continue our mission.

Sincerely,

Elizabeth Grice  
Advisory Board Member

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Executive Director

## Examples of ways to leave a gift to MaxFund in a will or trust.

- 1) **Specific gift:** You describe exactly what kind of gift you want to leave to a specific individual or organization and the designated source. If you want to leave a specific dollar amount from a specific source or a particular item (such as a piece of property or a collector's item), this is the type of bequest you would use.

*Example — Jennifer states in her will: "I leave my art collection to my grandson, Daniel. I leave my mountain house to my daughter, Linda. I leave my securities to MaxFund Inc."*

*Example Susan states in her will: "I leave \$50,000 to my nephew, Michael. I leave \$25,000 to MaxFund Inc."*

- 2) **Residuary gift:** This type of bequest is honored after all other bequests have been made, and all debts, expenses and taxes have been paid.

*Example — Jessica states in her will: "I give all the rest, residue and remainder of my real and personal estate to MaxFund Inc."*

- 3) **Contingent gift:** This type of bequest is fulfilled if certain conditions are met. For instance, if your primary beneficiary does not survive you, you can indicate your next choice through a contingent bequest.

*Example — William states in his will: "I give all the rest, residue and remainder of my real and personal estate to my wife, Margaret, if she survives me; if not, then 50 percent in equal shares to my children who survive me and 50 percent to MaxFund Inc."*