



THE LEGACY SOCIETY FOR HANDI-DOGS

The Legacy Society for Handi-Dogs is a group of caring individuals committed to ensuring the long-term sustainability of Handi-Dogs, Inc. These individuals have thoughtfully planned to financially support Handi-Dogs, Inc. in a special way. Their 'Planned Gifts' provide the resources to preserve the organization's future and ensure it is available to serve others for generations to come.

To become a member of The Legacy Society for Handi-Dogs, simply tell us you have arranged in your estate plans for a Planned Gift to benefit Handi-Dogs, Inc.

Email: CEO@Handi-Dogs.org

Write: Handi-Dogs, Attn: President / CEO, 75 S. Montego Dr., Tucson AZ 85710

Members of the Legacy Society will be invited to special events and, if desired, have their names listed on a special place in our Training Center, website and in other publications.

Types of Planned Gifts

There are many ways in which you can make Planned Gifts. A few of the most common ways are:

Gifts from Your Will or Trust:

- ◆ Leave (bequest) a monetary donation to Handi-Dogs, Inc.
- ◆ Leave specific property to Handi-Dogs, Inc.
- ◆ Leave a percentage of your estate to Handi-Dogs, Inc.
- ◆ Leave a gift to the Handi-Dogs Endowment Fund, held at the Community Foundation for Southern AZ.
- ◆ Your assets remain in your control during your lifetime. You can modify your gift to address changing circumstances.

Gifts of Appreciated Stocks, Bonds, Mutual Fund Shares:

- ◆ Transfer your appreciated stocks, bonds, or mutual fund shares, which you have owned for at least one year, to Handi-Dogs, Inc.
- ◆ Handi-Dogs, Inc. will sell your securities and use the proceeds for its programs and operations.
- ◆ You pay no capital gains tax on your federal income tax when the stock is sold. You can receive a charitable deduction on your income tax based on the fair market value of the securities on the date of transfer.

Retirement Plans/ IRA (Individual Retirement Account):

- ◆ Name Handi-Dogs, Inc. as a beneficiary in your retirement plan or IRA.
- ◆ This eliminates your heirs having to pay income tax on the plan's assets designated to Handi-Dogs, Inc.

Life Insurance:

- ◆ Name Handi-Dogs, Inc. as a beneficiary of your paid-up policy of coverage you no longer need.

Handi-Dogs, Inc. Tax ID # is: 95-3247091

As noted above, many of the above giving options also have tax benefits for you and/or your heirs. It is recommended to always seek advice from your attorney and/or financial advisor before making any decisions. They can also provide you with information on additional Planned Gift options such as creating Charitable Lead Trusts, Charitable Gift Annuities, Deferred Gift Annuities, etc. Some of these options provide for income for you and tax benefits while you are alive.

You may also get impartial and complimentary advice by speaking with a representative of the Center for Planned Giving at the Community Foundation for Southern Arizona - call: 520-770-0800.

Sample language for remembering Handi-Dogs, Inc. in your Will.

A charitable bequest (gift) to Handi-Dogs, Inc. allows you to leave your legacy to continue your support of our mission. Charitable bequests are typically deductible as an estate tax charitable contribution which may reduce your estate taxes.

Outright Bequest

I give, devise and bequeath the sum of _____ dollars (or percentage, or describe property) to Handi-Dogs, Inc., 75 S. Montego Drive, Tucson AZ 85710 to be used for its general purposes.

Residuary Bequest (*Leaves any remainder after all other bequests have been paid,*)

I give, devise and bequeath all (or any percentage) of the residue and remainder of my estate to Handi-Dogs, Inc., 75 S. Montego Drive, Tucson AZ 85710, to be used for its general purposes.

Contingency Gift (*Takes effect only if a primary intention can't be met.*)

If (name of beneficiary/s) does not survive me, or shall die during the administration of my estate, or as a result of a common disaster, then I give to Handi-Dogs, Inc., 75 S. Montego Drive, Tucson AZ 85710 all of the rest, residue, and remainder of my estate, to be used for its general purposes.

Handi-Dogs, Inc. Founder & Legacy Society Member, Alamo Reaves

Alamo Reaves had severe rheumatoid arthritis. At a time when service dogs were utilized to help only the visually or hearing impaired, she became a pioneer in training dogs to help people with other disabilities. She first trained her dogs, then began helping others train their dogs and founded Handi-Dogs, Inc. in 1973. In 1978 the organization was established as a 501(c)(3) non-profit.



In 2005, the Handi-Dogs Training Center, named in her honor, was built. It is located on the east side of Tucson providing climate-controlled space for comfortable, year-round training.

Ms. Reaves thoughtfully arranged for a significant portion of her estate to be left to support Handi-Dogs' future. Upon her passing, an endowment fund was established providing annual income to support today's programs and services. As a result of her planned gift, her support of our mission will continue for generations to come.

If you have any questions about The Legacy Society for Handi-Dogs, please contact Handi-Dogs' President/CEO, JoAnn Turnbull at 520-326-3412 or via email at ceo@handi-dogs.org.

