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The purpose of this publication is to provide general planned giving information. The information presented here does not constitute legal, tax, or investment advice. Such advice can only be obtained from a qualified tax advisor, attorney, and/or financial planner. Please consult with the appropriate professional.

*Cat Adoption Team is a 501(c)(3) nonprofit organization. Federal Tax ID #20-0773189.*



# PLAN FOR YOUR PETS

You want to leave a legacy and support the ones you love forever. That includes your pets.

When you create a lifetime care plan now, you ensure that your cats will have ongoing care. A comprehensive plan identifies the person who has agreed to take over care of your cat, outlines care instructions, and directs any financial assistance you wish to provide.

Some donors choose **CAT's Loving Legacy program** as a backup to their lifetime care plan or when no alternative caregiver is available. Through this program, we may agree to take in, care for, and find a new home for your cat as part of your planned gift arrangements.

**“WE ARE THRILLED TO PARTICIPATE IN CAT'S LOVING LEGACY PROGRAM TO MAKE SURE THAT THE ONES WHO SURVIVE US WILL BE TAKEN CARE OF, AND TO CONTRIBUTE TO THE ONGOING GREAT WORK AT CAT.”**

**— CATHY B. & TOM H.**

Like you, we want what's best for your cat. Contact us and we'll work with you to discuss the options and determine if Loving Legacy is a good fit.

**Learn more**  
[catadoptionteam.org/loving-legacy](http://catadoptionteam.org/loving-legacy)



**LEAVE A LEGACY  
FOR CATS**



# MAKE A LASTING IMPACT

Throughout your lifetime, you've made an impact on the people, causes, and cats you care about. Planning for your legacy means you can continue making a difference for the ones you love—now and always.

Your planned gift to **Cat Adoption Team (CAT)** ensures that cats and those who care for them will have access to excellent programs and services for years to come. Such gifts sustain current efforts and fund lifesaving programs and capital improvements that otherwise wouldn't be possible.

**CAT IS DEDICATED TO IMPROVING THE LIVES OF FELINES. THAT IS WHY I JOINED THE PLANNED GIVING PROGRAM AND PROVIDE FOR CAT IN MY WILL.**

— LYNDA O.

# KNOW YOUR OPTIONS

You have a lot of options when it comes to estate planning. These questions can help you decide which type of gift is right for you:

- How do you wish to provide for yourself and your loved ones, including pets?
- How do you wish to impact the shelter cats with your gift?
- What are your tax considerations?

Depending on your answers, you may choose to give through a **charitable trust, in your will, or by donating assets** such as securities or real estate. Or you might decide to name CAT as a beneficiary of a life insurance policy or retirement fund.

Your estate planner can help you build or amend your plans to meet your giving goals and maximize tax benefits.

## ROGER H. JAMES LEGACY SOCIETY

When you pledge a planned gift to CAT, you automatically become a member of the **Roger H. James Legacy Society**. This society was formed so that we can thank you and recognize you among our supporters.

### Learn more

[catadoptionteam.org/planned-giving](https://catadoptionteam.org/planned-giving)

## RESPONSE FORM

If you'd like more information or are already including us in your estate plans, please let us know. We'd love to talk with you and say thanks. Knowing your intentions also helps CAT plan for the future.

- Please contact me to discuss including CAT in my will or other estate plans.
- I have included CAT in my estate plans; **you may acknowledge me\*** publicly.
- I have included CAT in my estate plans; **I do not wish to be recognized publicly.**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

### Please detach and mail this form to:

CAT Communications & Development Office  
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*\*With your permission, your name—but never gift amount—may be included in our print or online materials recognizing planned giving donors.*

