



## PLANNED GIVING

### The Bird Rescue Center of Sonoma County

We are so grateful to our supporters! Many of you choose to make a gift to The Bird Rescue Center every year. Others have included a provision for us in your wills or living trusts. Some have done both. All giving greatly enhances our financial sustainability, ensuring the continuation of our life-saving work.

## ABOUT BRC

The Bird Rescue Center's mission is two-fold: 1) the rescue, rehabilitation and return to the wild of native and wild birds of all species, and 2) public education about the vital role these birds play in our environment and ecosystem health.



**(707) 523.2473**

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

The Bird Rescue Center  
PO Box 475, Santa Rosa CA 95402

Nonprofit Tax ID# 94-2378213



## ANNUAL GIVING

There are ways to maximize your annual gifts while providing you with extra tax benefits. In doing so, you continue to strengthen our future and provide much-needed care for our avian populations.

### IRA Required Annual Distributions

If you have an Income Retirement Account (IRA), once you reach the age of 72 years you are required to take annual Required Minimum Distributions. These distributions are subject to income tax and might possibly push you into a higher tax bracket. If you don't need the extra funds for living expenses, consider gifting them to The Bird Rescue Center as a Qualified Charitable Distribution. Because BRC is a registered 501(c)(3) non-profit and the IRA income is distributed directly to us, you do not need to report it as taxable income and will not owe any taxes on it. It's a win-win situation!

### Raising Your Charitable Giving Deduction Cap

For those who itemize income tax deductions, including gifts to 501(c)(3) public charities, the deduction cap has been increased for both individuals and corporations. Check with your tax preparer to see if making a donation to The Bird Rescue Center is advantageous to your tax situation.

### Estate Planning

To be effective, estate planning usually takes time, effort and a good attorney. It allows you the opportunity to think about what you would like the world to be like even after your death. In doing so, you can determine what your legacy will be once you are gone.

For any important financial decisions, including the ones suggested herein, please consult your tax accountant, financial advisor, attorney or estate planner for guidance. We understand that these decisions rest with you and you alone and we welcome all gifts from dedicated donors like you who support our mission.

## LEGACY GIVING

By planning ahead and making arrangements now for a legacy gift, you can rest assured that your wishes are fulfilled when it comes time to settle your affairs. And by defining your legacy gifts now, you can also help your family and heirs avoid the time delays, potential disputes, and needless expenses that can occur when a loved one dies without a will or designated beneficiary.

We encourage you to take care of your family's needs, and once that is done, please consider a legacy gift to The Bird Rescue Center. What follows is some basic information to get you started

### Bequests

One of the most common ways to provide a legacy gift is to include a bequest to The Bird Rescue Center in your will or living trust. Your bequest is under your complete control throughout your lifetime and only becomes irrevocable at the time of your death. Upon distribution of your estate, BRC receives the bequest you specified, which will be tax-exempt under state and federal law. If you already have a will or living trust, you don't have to rewrite your current documents. A simple codicil (or amendment) can be added. Below is some suggested language, but please consult with your attorney, estate planner or legal consultant.

*"I give, devise and bequeath to The Bird Rescue Center of Sonoma County (tax ID #94-2378213), located in Santa Rosa, California, the sum of \_\_\_\_\_ dollars (\$\_\_\_\_\_) for the benefit of its general purposes."*

Note: Rather than designating a specific sum, you can state a percentage of your estate; specify shares of stock (include the name of the stock and the number of shares); designate all or a portion of the proceeds from a life insurance policy; or describe real or personal property (include a description and the exact location).

### Beneficiary of An Asset

It's easy to name The Bird Rescue Center as a beneficiary of a retirement account, life insurance policy, or an annuity. These gifts cost you nothing now, enable you to change beneficiaries at any time, and require no minimum contribution. If you designate BRC as a beneficiary, it is always best to also include this beneficiary designation in your will. As noted above, this can be accomplished with a codicil (or amendment) if your will has already been prepared.