



Compassion for Animals Today

Beneficiaries and Payable-on-Death Accounts

Our legal name: **Here Today Adopted Tomorrow Animal Sanctuary**
Our address: **PO Box 557, 180 Sturbridge Road, Brimfield, MA 01010**
Our IRS tax identification number: **45-4064773**
We are a 501(c)(3) tax exempt organization.

A **beneficiary** is a designated person or agency set to receive certain benefits upon the death of the benefactor. Life insurance policies and retirement accounts often require a benefactor to list beneficiaries. You can make Here Today Adopted Tomorrow Animal Sanctuary a beneficiary of accounts, by simply naming the shelter as a listed beneficiary.

To make Here Today Adopted Tomorrow Animal Sanctuary a beneficiary of your accounts:

- Contact your life insurance or retirement account provider
- Request to list the shelter as a beneficiary
- Provide the shelter's legal name, address, and IRS tax identification number
- Send a copy of the beneficiary paperwork to the shelter, **Attn: Planned Giving Programs**
- Ask that a designated family member inform the shelter of your passing

A **payable-on-death (POD) bank account** is an account created with the intention of gifting money directly to the listed beneficiary. You can make Here Today Adopted Tomorrow Animal Sanctuary a beneficiary of such an account, by setting one up and naming the shelter as its beneficiary.

To set up POD bank account:

- Open a bank account
- Notify your bank that it is to be set up as a POD account
- Request to list the shelter as a beneficiary
- Provide the shelter's legal name, address, and IRS tax identification number
- Send a copy of the beneficiary paperwork to the shelter, **Attn: Planned Giving Programs**
- Ask that a designated family member inform the shelter of your passing

The **advantages** of beneficiary designations and POD bank accounts include:

- Your gift will leave behind a wonderful legacy and you will have the satisfaction of knowing you are helping to support our life-saving programs, like our Care for Life Program for medically needy cats
- These gifts don't necessitate the assistance of an attorney or tax adviser
- You retain exclusive control and use of the accounts while you are alive
- If your circumstances change, you can change the beneficiary designation or close the account

IF YOU ARE INTERESTED IN BEQUESTING A GIFT TO THE SHELTER OR IN ENROLLING YOUR CATS IN OUR BEQUEST FUNDED FEINE PROGRAM, PLEASE VISIT OUR WEBSITE'S **PLANNED GIVING PAGE**.

We strongly encourage you to consult with your legal and/or tax advisor/s. No Officer, Member, and/or Employee of Here Today Adopted Tomorrow Animal Sanctuary may offer legal advice.