MALINOIS & DUTCH SHEPHERD RESCUE

PLANNED GIVING INFORMATION

Leaving a legacy for Malinois & Dutch Shepherds

For donors, and for the attorneys, trust and will drafters and financial advisors who help them.

Thank you for considering a gift to MAD Rescue in your estate plans. This packet has everything your attorney or advisor needs to include MAD correctly: our exact legal name and tax ID, sample language for wills, trusts and beneficiary forms, a sample letter you can send your attorney, and a short form to let us know about your plans if you'd like to.

A planned gift can be any size. It can be a specific amount, a percentage of your estate, or what remains after you've provided for the people you love, and you can change it at any time.

Key facts for your attorney or advisor

Legal name	Malinois and Dutch Shepherd Rescue, Inc.
Federal tax ID (EIN)	85-1104462
Address	1667 Brown City Road, Imlay City, MI 48444
Tax status	501(c)(3) public charity; gifts are generally deductible as allowed by law
Planned giving contact	info@madrescueinc.org 844-MAD-RESQ (844-623-7377)

What's inside

1. About MAD Rescue and the details needed for drafting
2. Sample language for wills, trusts and beneficiary designations
3. A sample letter to your attorney
4. A confirmation form you can return to MAD (optional)

ABOUT MAD RESCUE

Who you're helping

Malinois and Dutch Shepherd Rescue, Inc. ("MAD Rescue") rescues Belgian Malinois and Dutch Shepherds who have been surrendered, abandoned or left in shelters. MAD has no shelter building: every dog lives with a volunteer foster family until adoption, and the work is done by volunteers across the country.

2,700	2,068	37	49
dogs taken in since 2020	dogs adopted	states with foster homes	states with MAD dogs

Figures from MAD's records as of the date this packet was printed.

Information for drafting

Exact legal name	**Malinois and Dutch Shepherd Rescue, Inc.**
Also known as	MAD Rescue; Malinois & Dutch Shepherd Rescue
Federal tax ID (EIN)	85-1104462
Tax status	Tax-exempt under Section 501(c)(3) of the Internal Revenue Code
Mailing address	1667 Brown City Road, Imlay City, MI 48444
Contact for planned gifts	info@madrescueinc.org · 844-MAD-RESQ (844-623-7377)
Website	https://thesystem.madrescueinc.org

Ways to include MAD

Will or living trust. A specific amount, a percentage, or all or part of the residue (what remains after other gifts), outright or as a backup (contingent) gift.

Beneficiary designation. Name MAD as a full, partial or contingent beneficiary of a retirement account (IRA, 401(k), 403(b)), a life insurance policy, or a bank or brokerage account (payable-on-death or transfer-on-death). This is done on the provider's form, without changing your will. Retirement accounts can be especially tax-efficient to leave to a charity.

Qualified charitable distribution. IRA owners aged 70½ or older may be able to give directly from an IRA during their lifetime.

Unrestricted gifts help most. They let MAD meet the greatest need at the time the gift arrives, years from now. If you'd like to direct your gift (for example, to medical care), please include flexible language like the sample on the next page.

MAD Rescue does not provide legal or tax advice. Donors should consult their own attorney or advisor.

SAMPLE LANGUAGE

For wills, trusts and beneficiary forms

These samples are a starting point for your attorney, who will adapt them to your plan and your state's law.

Specific amount

> I give to Malinois and Dutch Shepherd Rescue, Inc., a nonprofit corporation with its principal office at 1667 Brown City Road, Imlay City, MI 48444, federal tax identification number 85-1104462, the sum of $_____, to be used for its general charitable purposes.

Percentage of the estate

> I give to Malinois and Dutch Shepherd Rescue, Inc., a nonprofit corporation with its principal office at 1667 Brown City Road, Imlay City, MI 48444, federal tax identification number 85-1104462, _____ percent (___%) of my estate [or: of the trust estate], to be used for its general charitable purposes.

Residue (what remains)

> I give all [or: _____ percent] of the rest, residue and remainder of my estate to Malinois and Dutch Shepherd Rescue, Inc., a nonprofit corporation with its principal office at 1667 Brown City Road, Imlay City, MI 48444, federal tax identification number 85-1104462, to be used for its general charitable purposes.

Contingent (backup) gift

> If [name of primary beneficiary] does not survive me, I give [the gift above] to Malinois and Dutch Shepherd Rescue, Inc., a nonprofit corporation with its principal office at 1667 Brown City Road, Imlay City, MI 48444, federal tax identification number 85-1104462, to be used for its general charitable purposes.

Gift for a particular purpose

> I give to Malinois and Dutch Shepherd Rescue, Inc., a nonprofit corporation with its principal office at 1667 Brown City Road, Imlay City, MI 48444, federal tax identification number 85-1104462, the sum of $_____ [or: ____ percent of my estate], to be used for the veterinary and medical care of dogs in its care. If in the judgment of its board of directors this purpose can no longer be usefully carried out, the gift may be used for the organization's general charitable purposes most closely related to my intent.

Beneficiary designations

On the account provider's beneficiary form (IRA, 401(k), life insurance, payable-on-death or transfer-on-death account), list:

> Beneficiary: **Malinois and Dutch Shepherd Rescue, Inc.**
> Tax ID (EIN): **85-1104462**
> Address: 1667 Brown City Road, Imlay City, MI 48444
> Percentage: ____ % (primary or contingent)

MAD Rescue does not provide legal or tax advice. Donors should consult their own attorney or advisor.

SAMPLE LETTER

A letter to your attorney or advisor

Copy, adjust and send this with the packet. Replace the parts in [brackets].

[Date]

[Attorney or advisor's name]
[Firm]
[Address]

Dear [Name],

I would like to include a charitable gift to Malinois and Dutch Shepherd Rescue, Inc. ("MAD Rescue") in my estate plan. MAD Rescue is a 501(c)(3) nonprofit organization; its federal tax ID is 85-1104462, and its address is 1667 Brown City Road, Imlay City, MI 48444.

I am thinking of leaving [a specific amount of $_____ / _____ percent of my estate / the residue of my estate / a beneficiary designation on my (IRA, life insurance, account)] to MAD Rescue for its general charitable purposes [or: for the medical care of its dogs].

Enclosed is MAD Rescue's planned giving information, which includes sample language. Please let me know how you recommend structuring this gift, and whether a beneficiary designation or a provision in my will or trust would work best for my situation.

Thank you,

[Your name]
[Phone] · [Email]

Want to talk it through first? MAD is glad to answer questions in confidence, with no obligation: info@madrescueinc.org or 844-MAD-RESQ (844-623-7377).

LET US KNOW (OPTIONAL)

Legacy gift confirmation

If you've included MAD Rescue in your plans, we'd be grateful to know, so we can thank you and honor your wishes. This form is not a binding commitment, and you can change your plans at any time. Return it to info@madrescueinc.org or by mail to 1667 Brown City Road, Imlay City, MI 48444, or tell us online at https://thesystem.madrescueinc.org/donate/planned-giving/.

Name(s) _____

Address _____

City, state, ZIP _____

Phone _____

Email _____

I have included MAD Rescue through:

- ☐ My will
- ☐ My living trust
- ☐ A beneficiary designation (retirement account, life insurance, bank or brokerage account)
- ☐ Other: _____

The gift is (optional):

- ☐ A specific amount of approximately $_____
- ☐ A percentage of my estate: _____ %
- ☐ The residue (or part of it)
- ☐ I'd rather not say

Recognition:

- ☐ You may thank me publicly, listed as: _____
- ☐ Please keep my gift anonymous

Purpose:

- ☐ General support, wherever the need is greatest
- ☐ A particular purpose: _____

Signature _____

Date _____

Thank you. A gift like yours will care for dogs MAD hasn't met yet.