

A Legacy of Justice for Animals



**ANIMAL LEGAL
DEFENSE FUND**

A Legacy of Justice for Animals

Since 1979, the Animal Legal Defense Fund (ALDF) has been fighting to create a world where animals are protected by strong laws, defended in courtrooms, and treated with the compassion and dignity they deserve.

But the fight for animals doesn't end with one case, one law, or even one lifetime.

This work takes time, persistence, and supporters who believe animals deserve compassion, safety, and justice.

“Improving animal welfare at a legal level will have the broadest, longest-lasting impact. Each legislative victory will help countless animals far into the future.”

— Natalie Melnyk, Justice Legacy Society Member



By including ALDF in your estate plans, you can carry those values forward while also caring for the people you love. A legacy gift of any size helps ensure animals will continue to have powerful legal advocates on their side for generations to come.

Through your legacy gift, you can help:

- Bring legal expertise to cases where animals are suffering and need intervention.
- Strengthen and defend laws that protect animals from cruelty.
- Equip future attorneys, advocates, and law students with the training and resources they need to carry this work forward.
- Build a future where animals are recognized not as property, but as living beings worthy of protection, dignity, and justice.
- Continue ALDF's mission of protecting the lives and advancing the interests of animals through the legal system.

You may never meet the animals your gift will protect or see every victory your generosity makes possible. But through your legacy plan, you can help ensure that the fight for justice never stops.



THE JUSTICE LEGACY SOCIETY

When you choose to include ALDF in your estate plans, you become part of the **Justice Legacy Society** — a community of more than 700 compassionate supporters who share a vision for a better future for animals.

Together, you are creating something far greater than any one gift: the promise that, no matter what challenges lie ahead, animals will continue to have champions fighting on their behalf. With that promise comes the peace of knowing that your values and your love for animals will endure, creating a lasting legacy of protection and justice.

Above all, your legacy gift ensures that your compassion for animals will continue to be seen — and your impact will continue to be felt — for generations to come.

CREATING YOUR LEGACY

Estate planning is one of the greatest gifts you can give to your loved ones, to the causes you cherish, and to the future you wish to create.

A thoughtful plan provides peace of mind, ensures your wishes are honored, and makes the process easier for those who will carry them out.

To include ALDF in your plans, please use the following information:

Animal Legal Defense Fund
P.O. Box 96041
Washington, D.C. 20077
Tax ID: 94-2681680
707-795-2533 ext. 1034
estates@aldf.org

To learn more, please visit our website at aldf.org/legacy.

PLANNING YOUR LEGACY

It can be difficult to know where to begin when making your estate plan. The good news is that the process can be simplified by breaking it into manageable steps. No matter the size of your assets, everyone has an estate to plan. Common assets include retirement accounts, life insurance policies, savings and checking accounts, real estate, mutual funds, stocks, donor advised funds, and personal property. The enclosed Legacy Planning Guide can help you organize your assets, identify key contacts, and document beneficiaries as you begin the planning process.

Please note that this estate planning information is intended for general informational purposes only and should not be construed as legal, tax, or financial advice. Animal Legal Defense Fund recommends that you consult with your own attorney, tax advisor, or financial planner to determine how a gift to ALDF may impact your individual situation.



WHO WILL HONOR YOUR WISHES

Executor, Trustee, or Personal Representative

Depending on the setup of your estate, including whether you are working with a will, trust, or other instrument, choosing an executor, trustee, or other relevant personal representative is an important part of the estate planning process. This individual will be responsible for carrying out your wishes, managing expenses, and distributing assets according to your estate plan. The best choice is someone you trust, who can exercise sound judgment and is willing to serve in this role. Since administering an estate can take time, it may be helpful to name a successor contact in case your first choice is unable to serve. If a family member or friend is not available, a professional fiduciary or trust company may be able to act on your behalf.



Financial and Healthcare Power of Attorney

A financial power of attorney is a legal document authorizing someone to handle financial matters on your behalf, while a healthcare power of attorney is a legal document that allows someone to make medical decisions if you are unable to do so for yourself. These responsibilities may be assigned to one person or shared between two individuals. As with any important role, it is advisable to name a successor and discuss your wishes in advance so those you appoint will clearly understand your preferences.

Advance Healthcare Directive

An advance directive is a legal document that outlines your preferences for medical care if you become unable to communicate your wishes. Requirements vary by state, but these documents generally allow you to provide guidance about the care and treatment you would like to receive in the event of a serious illness or injury.

BENEFICIARIES AND HOW TO GIVE

Your estate plan can reflect your values and the people, organizations, and causes that matter most to you. Beneficiaries can include family members, friends, companion animals, and charitable organizations like ALDF.

Legacy gifts can be structured in several ways. You may choose to leave a specific dollar amount or asset, designate a percentage of your estate, or name beneficiaries to receive the remainder of your estate after other distributions have been made. You may also designate primary, secondary, and contingent beneficiaries to ensure your wishes are carried out under certain defined circumstances.

TYPES OF PLANNED GIFTS

Will and Trusts

A gift through your will or trust is the most common way to support ALDF and is one of the most flexible options. You can leave a specific dollar amount, a particular asset, a percentage of your estate, or a residual gift after loved ones have been provided for. Since wills and trusts can be updated as life events occur and circumstances change, they allow you to retain control of your assets during your lifetime while planning for the future.

Will

A will is a legal document that outlines how your assets should be distributed after your lifetime. It can be updated as your circumstances or wishes change and is one of the most common ways to leave a legacy gift.



Revocable Living Trust

A revocable living trust allows assets to be placed within the trust during your lifetime and distributed according to your wishes after your lifetime. Since a trust can be amended as circumstances change and life events occur, a revocable trust offers flexibility while helping simplify the administration of your estate.

Charitable Remainder Trust

A charitable remainder trust can provide income to you or another beneficiary for a specified period of time, after which the remaining assets support charitable organizations such as ALDF. Depending on your circumstances, it may also offer certain tax benefits.

Charitable Lead Trust

A charitable lead trust provides support to charitable organizations for a specified period of time. When the trust term ends, the remaining assets pass to the beneficiaries you designate, such as family members or other loved ones.

UNDERSTANDING THE DIFFERENCE

The primary difference between a charitable remainder trust and a charitable lead trust is the timing of receipt of the charitable gift. With a charitable remainder trust, income is provided to you or your beneficiaries first, and the remaining assets support the charity later. With a charitable lead trust, the charity receives support first and the remaining assets pass to your designated beneficiaries at the end of the trust term.

MAKING A GIFT TO ALDF IN YOUR WILL OR TRUST

Many supporters choose to include ALDF in their will or trust. The following sample language may be shared with your attorney or estate planning professional as a starting point:

“I give, devise, and bequeath to the Animal Legal Defense Fund, Tax ID: 94-2681680, a nonprofit organization, located at P.O. Box 96041, Washington, D.C. 20077, USA, _____”

We have also partnered with FreeWill to allow our supporters to make a will or revocable living trust at no cost in as little as 20 minutes. To learn more, please visit us at aldf.org/legacy.

Beneficiary Designations

Many types of accounts or assets pass directly to the beneficiaries named on the account and are not distributed according to the terms of a will or trust. Examples include life insurance policies, retirement accounts, bank accounts, donor advised funds, and investment accounts. By completing or updating a beneficiary designation form, you can designate who will receive these assets and in what percentages. Since beneficiaries can be updated at any time, they are one of the simplest ways to make a future gift to ALDF.

To name ALDF as a beneficiary to your account, please use the following information:

Animal Legal Defense Fund
P.O. Box 96041
Washington, D.C. 20077
Tax ID: 94-2681680



Charitable Gift Annuities

A charitable gift annuity allows you to both make a gift to support ALDF while also receiving fixed payments for life. In exchange for an irrevocable gift, you will receive guaranteed income and may be eligible for certain tax benefits, with the remaining value of the gift supporting ALDF's mission in the future.

Charitable Gift Annuity payment rates are determined based on your age. The minimum age for payout of a gift annuity is age 55 and the minimum age to set up a deferred gift annuity is age 40. ALDF accepts charitable gift annuities starting at \$20,000 through the National Gift Annuity Foundation. Charitable gift annuities can benefit up to two individuals and may be an attractive option for supporters seeking both financial security and lasting impact.

Pet Trusts

Your companion animals are your family, and the creation of a pet trust allows you to provide for your animals in the event of your passing or disability. If your animal should pass away before the funds are exhausted, you can help other animals by naming ALDF as a beneficiary of the remainder assets.

Just like other types of trusts, pet trusts are legally enforceable and are managed by a named trustee who uses the funds within the trust to care for the animals. The trustee does not need to be the same individual that provides the care directly to the animals, in this case a caretaker can be named separately. It is recommended that a successor trustee and successor caretaker are also named in the pet trust in the event the first named individuals cannot fulfill these duties for any reason.

Pet trusts can include specific information to outline the standard of care your animal is accustomed to — ensuring their caregiver can provide a seamless transition for them.



“Among the most important things I hope to leave behind is a future where we continue fighting for animals and encouraging the next generation of advocates.”

— Sarah Luick, Justice Legacy Society Member

Qualified Charitable Distributions

A qualified charitable distribution (QCD) allows individuals aged 70 ½ and older to make a gift directly from an individual retirement account (IRA) to a qualified charitable organization such as ALDF. Depending on your circumstances, a QCD may provide tax advantages and can help satisfy all or part of your required minimum distribution (RMD) for the year.

To make a QCD gift to ALDF, please request that your information be released to our organization so that we can identify and acknowledge your gift in a timely manner. QCD gifts can be mailed to the following address:

Animal Legal Defense Fund
P.O. Box 96041
Washington, D.C. 20077

If you are interested in other types of planned gifts, please contact us at estates@aldf.org or 707-795-2533 ext. 1034

A GIFT THAT LIVES ON

By including ALDF in your plans, you can help ensure that the work to protect animals continues and that animals will always have advocates fighting for them in the years and generations ahead.

A legacy gift to ALDF is more than a financial decision — it is an enduring expression of compassion and a belief that animals deserve a more just world. It is a way to ensure that the progress we make today and the fight for justice never stops.

Thank you for considering this profound act of kindness and trust. We would be honored to carry your legacy forward and put your values into action for generations to come.

ALREADY MADE A GIFT TO ALDF?

If you have already included ALDF in your plans, we would love to hear from you. Sharing your intentions helps us honor your wishes, plan for the future, and ensure our records are accurate. Any information you provide will be kept confidential. Please contact us at aldf.org/shareyourlegacy.

FREQUENTLY ASKED QUESTIONS

Q: *What information is needed to make a gift to ALDF?*

A: To make a gift please include the following information:

Animal Legal Defense Fund
P.O. Box 96041
Washington, D.C. 20077
Tax ID: 94-2681680
707-795-2533 ext. 1034
estates@aldf.org



Q: Do you accept real estate?

A: Yes, we do! We do not accept direct transfers of real estate, but we are happy to accept the proceeds from real estate that is included in a will or trust and sold during the administration of the estate.

Q: Can ALDF act as my executor or trustee?

A: Although we would like to be of help, it is our policy to decline serving as an executor or trustee. Because ALDF would also be a beneficiary of the estate, taking on an administrative role could present a conflict of interest and/or may lead to unnecessary delays or costs. These costs could take away from your beneficial wishes which we also want to protect. If a family member or friend is not available to serve, your personal attorney, a professional fiduciary, or a trust company may be able to administer your estate for a fee.

Q: Is my estate large enough to leave a planned gift?

A: Yes! Gifts of any size are deeply appreciated. Many people choose to leave a percentage of their estate, which scales up or down with your estate size.

Q: Can my gift remain anonymous in publications?

A: Yes! We offer publication of the names of our Justice Legacy Society members such as in our Annual Report. If you prefer anonymity, you may choose to let us know about your gift, but request that your name not be shared publicly.

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Legacy Planning Guide



ASSET INVENTORY:

Asset	Approximate Value of Asset	Notes

KEY CONTACTS:

Type of Contact	Name of Contact
Executor, Trustee, or Personal Representative	
Successor Executor, Trustee, or Personal Representative	
Financial Power of Attorney	
Successor Financial Power of Attorney	
Healthcare Power of Attorney	
Successor Healthcare Power of Attorney	

BENEFICIARIES:

Beneficiary Name	Asset	Value or Percentage	Contingency (if applicable)	Special Instructions/Notes

NOTES:

