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Advisor's Guide for Planned Giving

Gifts from Wills and Trusts:
When making a charitable gift to a nonprofit organization, it is vital the legal name of the charity, city and other identifying details be used. To name the Brandywine Valley SPCA in your will or trust please use the following suggested language:

Residual Gift Language:
A residual bequest comes to us after your estate expenses and specific bequests are paid: I give and devise to the Brandywine Valley SPCA, all (percentage) of the residual of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or program).

Specific Gift Language:
Naming the Brandywine Valley SPCA as a beneficiary of a specific amount from your estate is easy:
I give and devise to the Brandywine Valley SPCA, the sum of $_____ (or asset) to be used for its general support (or for the support of a specific fund or program).

Contingent Gift Language:
The Brandywine Valley SPCA or its affiliates can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled:
If (insert name) is not living at the time of my demise, I give and devise to the Brandywine Valley SPCA, the sum of $ _____ (or all or a percentage of the residual of my estate) to be used for its general support (or for the support of a specific fund or program).

Gifts of Appreciated Securities:
Legal Name: The Brandywine Valley SPCA
Tax I.D. Number: 23-1381030
DTC Number: 2039 Incorporated In: Chester County, PA

Beneficiary Gifts from Retirement Plans, Life Insurance, Brokerage Accounts or any other plan with a beneficiary designation:
Please contact Adam Lamb for a stock transfer form. Beneficiary Gifts from Retirement Plans, Life Insurance, Brokerage Accounts or any other plan with a beneficiary designation: Please contact your plan provider for a change of beneficiary form. Once you have filled out the form, please send a copy to Adam Lamb, Chief Executive Officer at alamb@bvspca.org.

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Tax I.D. Number: 23-1381030
Incorporated In: Chester County, PA

Note to Attorneys, Accountants and other professional Advisors:
Thank you for helping your client with their charitable planning. If you have any questions or concerns, please contact Adam Lamb, Chief Executive Officer at 484-302-0025 or alamb@bvspca.org.