



# Planned Gifts

Thank you for considering a planned gift to the Pueblo Zoo. Whether you choose to make a gift through your estate or a gift during your lifetime, you will join a group of thoughtful and generous individuals who have made transformational investments in education, animal care, exhibits, and conservation right here at the Pueblo Zoo. What will your legacy be?



## For your records

Legal Name: Pueblo Zoological Society  
Tax Identification Number: 84-0723360  
Mailing Address: 3455 Nuckolls Ave  
Pueblo, CO 81005

## Sample Bequest Language

“I give, devise, and bequeath \_\_\_\_\_% of my total estate, determined as of the date of my death, to the Pueblo Zoological Society, a nonprofit organization located at 3455 Nuckolls Ave, Pueblo, CO 81005, Federal Tax ID #84-0723360”

If you are considering a bequest, and would like to dedicate your gift to a specific purpose, please let us know. We would love to work with you to identify needs to meet your charitable goals.



## Questions?

Karen Lillie,  
Resource Development Director,  
719-561-1452 ext. 127  
klillie@pueblozoo.org

# Ways to Give

<b>Gift Type</b>	<b>How to Give</b>	<b>Benefits</b>
<b>Bequests</b>	Include the Pueblo Zoo in your will or living trust.	<ul style="list-style-type: none"> <li>- Your assets are distributed based on your wishes</li> <li>- May allow you to make a larger gift than you could in your lifetime</li> </ul>
<b>Retirement Plan Gifts</b>	Name the Pueblo Zoo as whole or partial beneficiary of your 401k or IRA.	- Income tax savings (these types of gifts may be subject to income tax if distributed to an heir; charities are not subject to these taxes)
<b>Life Insurance Gifts</b>	Name the Pueblo Zoo as whole or partial beneficiary on an existing policy, or transfer ownership on a policy you no longer need.	- Current income tax deduction of cost basis with ownership transfer

## Gifts in your Lifetime

<b>IRA Distribution</b>	Make a gift directly from your IRA to the Pueblo Zoo	- Counts towards your required minimum distributions as a qualified charitable distribution
<b>Gifts of Appreciated Assets</b>	Make a gift of appreciated stocks to the Pueblo Zoo	<ul style="list-style-type: none"> <li>- Current income tax deduction</li> <li>- Avoid capital gains tax</li> </ul>
<b>Trusts &amp; Annuities</b>	Create a charitable gift annuity or charitable remainder trust with the Pueblo Zoo as a beneficiary.	<ul style="list-style-type: none"> <li>- Reliable, supplemental income payments during your lifetime</li> <li>- Current income tax deduction</li> </ul>

*The information above is provided only as an overview of giving options. The Pueblo Zoo is not able to give tax or legal advice. To design a gift that benefits the people and organizations you care about most, we recommend that you obtain the professional counsel of an attorney or CPA who is familiar with your particular circumstances.*