

# Stock, Retirement, Investments, and Other Financial Assets



Leave a life-saving legacy **that costs nothing during your lifetime.** It can also benefit you and your family while benefiting Guardian Angels Medical Service Dogs.

## Key Benefits to You:

- You support Guardian Angels without reducing your income or diminishing your savings.
- Your assets remain in your control during your lifetime – you can modify them anytime.
- Your gift can lower the tax burden for your heirs.
- Most planned giving options can be made without legal expense.

## How It Works

### **Beneficiary Designations - IRAs, 401(k), 403(b), Life Insurance, Stock, Mutual Funds, and Bank Accounts (e.g., Checking and Savings)**

Support our mission by completing a simple form to designate Guardian Angels as a beneficiary on your financial investments and/or bank accounts.

- Ask your bank for a P.O.D. (Payable on Death) form for your checking, savings, or other bank accounts.
- Ask your retirement plan, investment account (including stock), and/or insurance policy administrator for a T.O.D. (Transfer on Death) form.
- Complete and return the form(s) to your account administrator and these assets will be transferred to Guardian Angels upon your death.
- Note: Some companies may also call these "Beneficiary Designation" forms.
- List us on the form(s) as: Guardian Angels Medical Service Dogs, Inc., 3251 NE 180th Ave., Williston, FL 32696, Tax ID: 27-2667123.

### **Stock Transfers**

Guardian Angels can receive transfers of stock at any time for any amount of stock.

- Contact us and request our stock transfer form.
- The form provides the information needed to transfer your stock via ACH or wire transfer.
- Identify *Guardian Angels Medical Service Dogs Inc.* as the fund you'd like to transfer your stock to on page 2 of the document and return it following the instructions provided.
- Please also send the completed form to Guardian Angels so we can acknowledge your generosity.

## For More Information

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We recommend always consulting with your attorney or financial advisor when making or revising estate plans.