

Create Your Legacy

All horses at MVHR are loved and cared for throughout their lives with a safe place to return any time it is needed, even after adoption. Their care is ongoing, 24 hours a day, 7 days a week, 52 weeks a year... sometimes for 47 years, like our dear Sinclair! Please join us in our ongoing effort to make this safe place and a safe future for horses possible. 100 years from now, you can still have an impact on the care of horses in need. Create your legacy by making a planned gift to Mountain Valley Horse Rescue. Through a planned gift, you will be a part of making an everlasting difference in the lives of rescue equines long into the future.

Lend your Hopeful Heart to Helping Horses by making a legacy gift to MVHR today!

Ways to Make a Legacy or Planned Gift

Will

Naming Mountain Valley Horse Rescue as a beneficiary of your will is one of the easiest ways to ensure that charitable giving is part of your life's legacy. In as little as one sentence, you can complete your gift. This type of donation to MVHR in your will or living trust helps ensure that we continue our mission for years to come.



IRA or Retirement Plan



Make a difference today and save on taxes. It's possible when you designate Mountain Valley Horse Rescue as the beneficiary of your retirement funds. Retirement plans left to charities are not subject to income or estate tax.

No matter your age, you can designate MVHR as the beneficiary of all or a percentage of your IRA and it will pass to us tax-free after your lifetime. It's simple, just requiring that you contact your IRA administrator for a change-of-beneficiary form or download a form from your provider's website.

Tip: It's critical to let us know of your gift because many popular retirement plan administrators assume no obligation to notify a charity of your designation. The administrator also will not monitor whether your gift designations are followed. We would love to talk to you about your intentions to ensure that they are followed. We would also like to thank you for your generosity.

Life Insurance

Designate Mountain Valley Horse Rescue as the beneficiary of life insurance proceeds, allowing these assets to pass to the beneficiaries outside of your will. This gift is as simple as updating your beneficiary designation form with the policy holder. You can designate MVHR as the primary beneficiary for a percentage or specific amount. You can also make MVHR the contingent beneficiary so that MVHR will receive the balance of your policy only if your primary beneficiary doesn't survive you.



Bank and Investment Accounts

Make a charitable gift by naming Mountain Valley Horse Rescue as the “payable on death” beneficiary of your bank and investment accounts.

MVHR also accepts gifts of stock. Securities and mutual funds that have increased in value, and have been held for more than one year, are one of the most popular assets to use when making a gift to Mountain Valley Horse Rescue. Making a gift of securities or mutual funds offers you the chance to support our mission while realizing important benefits for yourself. When you donate appreciated securities or mutual funds that you have held for more than one year in support of our mission, you can reduce, or even eliminate, federal capital gains taxes on the transfer. You may also be entitled to a federal income tax charitable deduction based on the fair market value of the securities at the time of the transfer. Our account is with Edward Jones. Securities can support MVHR’s mission in two ways:

- When you donate securities to the MVHR, you receive the same income tax savings that you would if you wrote MVHR a check, but with the added benefit of eliminating capital gains taxes on the transfer, which can be as high as 20 percent.
- A transfer on death (TOD) account*: By placing a TOD designation on your brokerage or investment account, that account will be paid over to one or more persons or charities after your lifetime.



Endowed Gifts



An endowment gift to the MVHR Endowment Fund provides support for horses today, tomorrow and beyond, truly ensuring all MVHR horses have the care and love they need throughout their lives and for generations to come. When you make a donation to our endowment, you give a gift with both immediate and long-term benefits.

Endowment donations are invested. A portion of the annual income from the investment is used to address immediate needs at MVHR. The remaining funds are reinvested to ensure long term support.

Make Your Plan Today

Talk to your financial advisor or estate planning/tax attorney about other creative ways to help support Mountain Valley Horse Rescue for years to come!

When naming us in legal documents, please note that we operate as Mountain Valley Horse Rescue, Tax ID #20-3009675. For any further questions about planned giving contact marleen@mvhr.net

**State laws govern payable on death accounts. Please consult with your bank representative or investment advisor if you are considering this gift. Information contained herein was accurate at the time of posting. The information on the MVHR website is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor.*

