

# LEGACY PLANNING WITH YOUR DAF



*Until every animal is free*



# YOUR DONOR-ADVISED FUND LEGACY PLAN

For your philanthropy to have the maximum impact, you need a thoughtful plan that includes decisions relating to the future of your donor-advised fund (DAF) after your lifetime.

By creating a legacy plan for your DAF that includes PETA, you'll be supporting our work to do the following:

- Promote the use of more scientific research methods that don't harm animals
- Bring more innovative alternatives to animal dissection into schools
- Reach more retailers, designers, and consumers with animal-friendly foods and fabrics
- Replace the use of chimpanzees and other animals in films and advertisements with computer-generated imagery
- Ensure our success responding to all forms of animal suffering with the latest practical tools for change and creative, forward-looking solutions

## Legacy Options

Please confirm with your DAF sponsor the exact options available to you. These may include the following.

- **Distribute all remaining funds:** Choose one or more charitable beneficiaries to receive all remaining DAF assets.
- **Establish an endowment:** Recommend that your assets be distributed over time in annual, recurring gifts to one or more charities.
- **Continue grants:** Name a joint advisor to recommend investments and grants now and to assume responsibility of the DAF after your death.
- **Select your interest:** Choose to distribute to a "field of interest" fund at the sponsoring organization and let it determine how to distribute those funds within that area of interest.

- **Encourage philanthropy by younger generations:** Choose one or more individual successors to manage their own DAF account funded with your DAF assets.

Or create a plan that contains two or more of these options!

## If You Don't Have a Succession Plan

- When you create a DAF or add additional assets to your account, you make a charitable gift to the sponsoring organization. You have the right to make non-binding recommendations as to how the funds are used, but the sponsoring organization has the ultimate decision-making power.
- For the most part, the sponsoring organization will almost always follow your recommendations, but once you

donate your assets to your DAF, you don't retain the right to contradict the sponsor's giving decisions.

- Without a succession plan, you lose the opportunity to recommend how your funds will be used. Since funds remaining

in your DAF belong to the sponsor, they will make those giving decisions moving forward. Your assets may fund causes and organizations that you would never have supported, given the choice. These are often called "orphaned donor-advised funds."

## The Impact You Can Have

We encourage you to contact us to discuss how you can use your DAF to fund future-forward investment opportunities that will keep our vital work for animals going strong.

## Your Investment Can Help End Animal Experimentation

This year, more than 100 million individual animals will suffer in the barren, steel cages of U.S. laboratories. Many of the crude and archaic tests they're subjected to date back nearly a century.

PETA's in-house scientists are driving the move to end the use of animals with tools such as cell-based (*in vitro*) experiments, advanced computer models, human-based tissue engineering, cancer organoids, and epidemiology studies that lead to results.

## Your Investment Can Cultivate Compassion Through Humane Education

Children have a natural affinity for animals, and PETA's humane education division, TeachKind, helps cultivate that compassion through free lesson plans and other educational tools.

Not only does teaching empathy and kindness help animals, it also helps children learn to relate to humans who may not look, talk, or behave exactly as they do. The program has reached more than 12 million students through curriculum kits, and our digital materials are downloaded by thousands of kind people each year.

A groundbreaking research study published in 2021 also found that students who read TeachKind's animal rescue stories performed significantly better in reading comprehension on Common Core-aligned tests.



## Your Investment Can Help End the Suffering of Farmed Animals

Most animals raised and killed for food are kept on factory farms, crammed by the thousands into sheds, cages, or other enclosures and denied everything that's natural and important to them.

PETA undercover investigations prompt consumer change and force corporate action. We secure shareholder resolutions by acquiring stocks to address the need for change, enlist the help of celebrity supporters to carry our vital messages far and wide, and seize every opportunity we can to spare animals the misery of modern agriculture.

After years of groundbreaking PETA campaigns, demand for vegan everything has soared, and major brands know it.

But we must do more to help people better relate to the individual cows, pigs, chickens, and other animals suffering for the food on their grocer's shelves.

## Your Investment Will Drive Innovation and Corporate Change

Persuading a single company to replace a cruel product with one that doesn't harm animals can almost instantly spare millions of animals suffering and set a precedent for other companies.

PETA has an experienced corporate responsibility team working directly with many of the biggest brands in the world. Roughly 75% of our negotiations are carried out behind the scenes.

We do the homework and then inform the companies of the suffering built into their supply chains, present kind alternatives for them, and publicly celebrate them when a compassionate change is made.

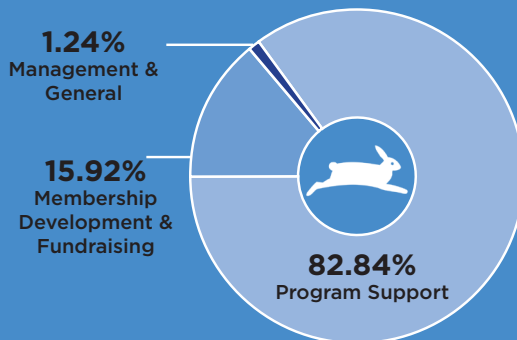
# PETA

### Headquarters

501 Front St.  
Norfolk, VA 23510  
757-622-PETA

[PETA.org](https://peta.org)

## PETA Financial Statement 2023 Fiscal Year Expenses



Out of every dollar we spend, more than 82 cents goes directly toward PETA's programs to combat animal suffering.