



MAKING A PLANNED GIFT

There are many ways to support the Sheldrick Wildlife Trust via the Sheldrick Wildlife Trust USA in which you, your loved ones, and SWT USA can mutually benefit and help ensure that elephants and wildlife in Kenya will remain protected for future generations. Many of these planned gifts are alterable, offering you peace of mind if your situation changes, and when given through the US 501c3 registered charity of Sheldrick Wildlife Trust USA, may afford your gift additional tax benefits.

TYPES OF GIFTS

Bequest by Will or Revocable Trust

You may identify Sheldrick Wildlife Trust USA as the beneficiary of a certain amount, specific asset, or percentage of your estate under your Will or Revocable Trust. Although you will not receive any tax benefits during your lifetime, following your passing, your estate may be eligible to take income and estate tax charitable deductions for the testamentary bequest to Sheldrick Wildlife Trust USA.

Sample language to bring to your attorney:

I give and devise to Sheldrick Wildlife Trust USA, Inc. (Tax ID #30-0224549), located in Laguna Hills, CA the sum of \$_____ (or %) to be used for its general support (or for the support of a specific program).

IRA Assets or Other Qualified Retirement Benefits

You can designate the Sheldrick Wildlife Trust USA as a partial, contingent or sole beneficiary of your IRA or other qualified retirement plans, such as your 401(k), 403(b), Keogh or profit-sharing pension. Designating SWT USA as a beneficiary of your retirement accounts is a tax-efficient way to maximize support for SWT USA, as the amount distributed to our organization will not be subject to income tax and will qualify for the estate tax charitable deduction.

In addition, if you are over 70½ years old, you may make a Qualified Charitable Distribution of up to \$100,000 per year from your IRA directly to SWT USA without having to include the amount distributed as income for federal income tax purposes. No charitable deduction may be taken, but such distributions will qualify for all or part of the IRA's required minimum distributions. Be sure to share this gift plan with your financial advisor.

Life Insurance

You can designate Sheldrick Wildlife Trust USA as the beneficiary of all or a percentage of your life insurance policy proceeds, which will be deductible for estate tax purposes following your passing. You may also irrevocably transfer ownership of a paid-up life insurance policy to Sheldrick Wildlife Trust USA during your lifetime and may take an income tax charitable deduction for the current value of the policy.

Certificates of Deposit, Savings or Brokerage Accounts

A simple way to provide for the future of elephants is by making the Sheldrick Wildlife Trust USA the "pay on death" beneficiary of the account. Charitable contributions made in this manner are treated the same as testamentary bequests for tax purposes.

Donor-Advised Funds

Final distribution of contributions remaining in a donor advised fund is usually governed by the terms of the agreement at the time the fund was created. You can name Sheldrick Wildlife Trust USA as a successor beneficiary or designate SWT USA to receive a portion of the remaining account value, leaving the balance for your family or friends to continue your legacy of philanthropy.

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Split-Interest Charitable Trusts

If you would like to benefit Sheldrick Wildlife Trust USA while obtaining an upfront income tax charitable deduction, and also potentially benefitting family members, you may consider a lifetime gift to an irrevocable charitable lead or charitable remainder trust. These trusts are structured to make distributions to charity either during or at the end of the trust term and also may support individual beneficiaries at certain times. You should discuss these and other more advanced planned giving opportunities with your tax advisors.

IMPORTANT INFORMATION

Please include the following important information when including Sheldrick Wildlife Trust USA in your estate plan:

Legal Name: The David Sheldrick Wildlife Trust USA, Inc.

Address: 25283 Cabot Road, Suite 101

Laguna Hills, CA 92653

Phone: (949) 305-3785

Website: www.sheldrickwildlifetrust.org

Tax ID #: 30-0224549

For more information please contact us at infous@sheldrickwildlifetrust.org

The information contained within this document is not legal or tax advice. Please consult your legal and/or tax advisor for advice regarding your specific situation and potential tax benefits.





ABOUT *the* SHELDRIK WILDLIFE TRUST

The Sheldrick Wildlife Trust embraces all measures that complement the conservation, preservation and protection of wildlife and habitats.

The Sheldrick Wildlife Trust (SWT) is one of East Africa's oldest and pioneering conservation organisations and has worked for the protection and conservation of wildlife and wild habitats in Kenya for over 40 years. Protecting elephants are at the heart of the Trust, operating the most successful orphan elephant rescue and rehabilitation program in the world. But it also does much more than this. The Trust works at a field level with local partners in areas where wildlife and ecosystems face existential threats from poaching, habitat loss and human-wildlife conflict to give hope to Africa's wild animals and habitats and secure a safe and bright future for both wildlife and humans.

HISTORY *of the* SHELDRIK WILDLIFE TRUST

Founded in 1977 by Dr. Dame Daphne Sheldrick DBE, in memory of her late husband, famous naturalist and founding Warden of Tsavo East National Park, David Leslie William Sheldrick MBE, the Trust has a rich and deeply rooted family history in wildlife and conservation. As the first warden of Tsavo East National Park, David Sheldrick charted a new course for conservation in Kenya, securing wilderness, studying flora and fauna, and combating poaching and other threats to wildlife. Daphne worked alongside her husband, and their home quickly became a haven for all manner of orphaned animals, with the first elephant and rhino orphans arriving in 1952. After David's passing in 1977, Daphne founded the Trust to realize his vision and build on the conservation foundations they had laid in the preceding decades.

The Sheldrick family remains at the heart of the organization; David and Daphne's daughter Angela serves as CEO and has been overseeing the SWT for nearly two decades. Her husband, Robert Carr-Hartley, and their sons Taru and Roan, are equally passionate about Kenya's wildlife and work alongside Angela to ensure that David and Daphne's legacy continues.

IMPACT *of the* SHELDRIK WILDLIFE TRUST

(AS OF APRIL 2020)



260+

rescued orphaned elephants



15

Anti-Poaching Teams



6,687

injured wild animals attended by
SWT/KWS Mobile Veterinary
Units



20,000km

patrolled by aerial pilots each
month



160,000+

snares removed



300km+

fencelines erected to mitigate
human-wildlife conflict and
habitat loss

THE MISSION *of the* SHELDRIK WILDLIFE TRUST USA

The mission of the Sheldrick Wildlife Trust USA (SWT USA) is to support the work of the Sheldrick Wildlife Trust through financial support, educational outreach, and public awareness initiatives that promote wildlife conservation in Kenya.

SWT USA operates with minimal administrative overhead. Its commitment to transparency and accountability has earned it a 4-star rating from Charity Navigator year-on-year and accreditation from GuideStar, GreatNonprofits, and the Better Business Bureau. As a Section 501(c)(3) nonprofit organization whose charitable purpose is to support programs and initiatives of the SWT, contributions made to SWT USA are tax-deductible to the extent provided by law. Funds are managed by its Board of Directors and disbursed at the Board's discretion to further SWT USA's charitable purpose. All of its financial support to the SWT is made through grants, which are requested by written application. Grants are approved by the Board of Directors and are the subject of written grant agreements with the SWT, with proof of expenditure.

Thanks to a thriving donor base, the impact of SWT USA continues to grow year-over-year, providing vital funding for the SWT's conservation programs. These include:



Orphans' Project

Rescue, raise and rehabilitate orphan elephants and other wild animals until they are ready to reintegrate back into protected areas.



Anti-Poaching Teams

Patrol on foot and by vehicle across Kenya providing anti-poaching support and thwarting all manner of threats to wildlife and wild spaces.



Mobile Veterinary Units

Work in key ecosystems across Kenya to administer rapid emergency treatment to sick and injured animals, saving hundreds of wild lives each year.



Aerial Surveillance Unit

Take to the skies to protect wildlife, monitoring for illegal activities and providing vital support to ground teams working in the field.



Canine Unit

Deployed to sniff out illegal activities including ivory and bushmeat poaching in the Tsavo Conservation Area.



Saving Habitats

Safeguard wild spaces and reduce human-wildlife conflict by erecting and maintaining fencelines and supporting community-led initiatives that preserve biodiversity.



Water for Wildlife

Provide permanent and temporary water sources to relieve animal suffering in locations that historically suffer from limited rainfall and drought.



Community Outreach

Change attitudes towards wildlife one individual at a time through community engagement and education initiatives, including tree planting and sponsored school field trips.

CONTACT US

We understand that leaving a planned gift is a decision you will want to think about very carefully. If you have any questions, please don't hesitate to get in touch on 949-305-3785 or email us at infous@sheldrickwildlifetrust.org