



Guide Dogs
for the Blind



GUIDING YOUR LEGACY

Everyone Deserves to Live the Life They Want to Live | Spring 2023

Legacy Gift Honors Passion for Animals

Tracy Hoffman Grubb and her husband, David, have a lifelong passion for and belief in the power of the human-animal bond.

“Wanting to be a part of this magic was only reinforced over my nearly 40 years in the biotech/pharma industry, during which I realized that the best medicines aren’t always in a bottle but sometimes arrive on paws,” Tracy said.

So, when Tracy moved to Marin, California in 2017 and discovered Guide Dogs for the Blind (GDB), she knew she wanted to be part of our special mission.

“No matter what my volunteer or donor activity might be, I always have a clear sight

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Tracy Hoffman
Grubb and Missouri



Smart Planning and Giving Tips for Every Stage of Life

As your life situation changes, so should your retirement planning. Below are helpful tips for planning at every age of your journey.

IN YOUR 50s

Create or update your will to reflect life changes such as grown children leaving home. Consider a more conservative investment strategy and increase retirement savings.

BEST WAYS TO MAKE AN IMPACT

- **Gift in your will or trust:** Costs you nothing today and can be made by adding one sentence.
- **Retirement plan assets or life insurance policies:** Naming Guide Dogs for the Blind as a beneficiary can be as simple as completing an online form.

IN YOUR 60s

Check with your financial advisor to make sure you are on track with retirement savings. If you have already retired, revisit your expenses, priorities, and health care needs.

BEST WAYS TO MAKE AN IMPACT

- **Donor-advised funds:** Offers the flexibility to recommend how much and how often money is granted to qualified nonprofits like Guide Dogs for the Blind.
- **Appreciated securities:** Donating stocks owned for longer than a year provides a tax deduction when you itemize and may also eliminate capital gains taxes.

IN YOUR 70s

Live within your budget so you do not outlive your assets. Meet with a professional advisor to align financial and philanthropic plans.

BEST WAYS TO MAKE AN IMPACT

- **Life income gifts:** You receive income for life and the remainder supports Guide Dogs for the Blind upon your passing.
- **Gift from your IRA:** If you are 70½ or older, give from your IRA directly to Guide Dogs for the Blind without having to pay income taxes on the money.

IN YOUR 80s, 90s AND BEYOND

Take pride in reaching these age milestones and enjoy family and friends. Inform loved ones of your final wishes and location of vital papers. Update your health care power of attorney and living will.

BEST WAYS TO MAKE AN IMPACT

- **Beneficiary designations:** Insurance policies and retirement plan assets may result in a large tax hit for your family, but they pass tax-free to us.
- **You've earned it:** Consider making or repeating any of the giving options shown at any age!



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line to why it matters and how it is making a difference in the lives of others,” Tracy said. “I am especially proud of the transparency and manner in which GDB continues to evolve while remaining laser-focused in this specific space.”

Tracy lives just a mile away from our GDB campus in San Rafael and shares her home with many furry friends, including GDB breeder, *Missouri*; *Missouri’s* father, a retired GDB breeder named *Alfred*; retired guide *Lucca*; and *Max*, a 22-pound pup.

Tracy and her family feel good about giving back to GDB through individual and family gifts, corporate matching, and legacy planning. Tracy is currently an active volunteer in many capacities including breeder custodian, campus tour docent, brood welcome receptionist, and more.



“As a relatively new volunteer at GDB, I hope my giving strengthens the staff and volunteer bond as we, together, carry forward GDB’s mission so that others may lead lives limited by only their imagination of what’s possible.”

-TRACY HOFFMAN GRUBB

Join Tracy and other caring members of our Legacy Society by including GDB in your estate plan. Contact us to learn more at 415.499.4456 or ejones@guidedogs.com.

Holiday Celebration

SAVE THE DATE FOR OUR
ANNUAL WINTER FUNDRAISER

Sun., Dec. 10, 2023

Register to attend at
www.guidedogs.com/ways-to-give/fundraising-events



Guide Dogs for the Blind

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