



The 1000 Friends of Oregon Legacy Club offers a unique opportunity to bring your philanthropic passions to life now and for years to come. By naming 1000 Friends of Oregon as a beneficiary of your will, trust, insurance policy, or retirement account, or by establishing a life-income gift, you will become a member of the Legacy Club. This special group is recognized in publications and events throughout the year.

Here are a few of the most popular ways to create a legacy:

Wills and Revocable Trusts *The easiest way to make an impact*

- A simple, flexible and versatile way to support our work is to make a gift in your will or trust. A charitable gift can name a specific item, an amount of money, or a percentage of your estate. If you wish to name 1000 Friends of Oregon in your estate plan, we should be named as: *1000 Friends of Oregon, a nonprofit corporation with principal business address of 133 SW 2nd Avenue, Suite 201, Portland, OR 97204, Federal Tax ID# 93-0642086*. By including a bequest to 1000 Friends in your will or trust, you are ensuring that we can continue our mission for years to come.

Beneficiary Designations *Continuing supporting our work after your lifetime*

- Passionate about supporting 1000 Friends of Oregon with our mission even after your lifetime? It's not only possible, it's easy to do with a beneficiary designation. Just name 1000 Friends as a beneficiary to receive assets such as retirement plans and life insurance policies after you're gone. You can name a specific dollar amount or a percentage of the account. Beneficiary designation forms can usually be accessed online through your providers, which allows you to update your designations over time without needing to change your will or trust.

Charitable Gift Annuities *Turn your generosity into lifetime income*

- When you look for ways to help 1000 Friends of Oregon with our mission, you shouldn't feel like you are choosing between your philanthropic goals and financial security. One gift that allows you to support our work while receiving fixed payments for life is a charitable gift annuity. Not only does this gift provide you with regular payments of income *and* allow us to further our work, but when you create a charitable gift annuity with 1000 Friends of Oregon you receive an immediate income tax deduction.

Charitable Remainder Trusts *Discover a gift that is truly win-win*

- If you have built up a sizeable estate and are also looking for ways to receive reliable payments, you should consider a charitable remainder trust. Benefits of a charitable remainder trust include: an immediate charitable income tax deduction, lifetime payments of income, and possible deferral of capital gain recognition. There are two ways to receive payments with charitable remainder trusts. The **annuity trust** pays you, each year, the same dollar amount you choose at the start. Your payments stay the same, regardless of fluctuations in trust investments. The **unitrust** pays you, each year, a variable amount based on a fixed percentage of the fair market value of the trust assets as measured each year. With a unitrust, if the value of the trust increases, so do your payments. If the value decreases, however, so will your payments. At the termination of the charitable remainder trust, all of the remaining assets will be distributed to 1000 Friends of Oregon to support our work.

IRA Charitable Rollover *A tax-saving way to help 1000 Friends of Oregon*

- If you are 70½ years old or older, you can take advantage of a simple way to benefit 1000 Friends of Oregon and receive tax benefits in return. You can give up to \$100,000 from your IRA annually directly to a qualified charity such as 1000 Friends without having to pay income taxes on the money. The transfer generates neither taxable income nor a tax deduction, so you benefit even if you do not itemize your deductions. If you have not yet taken your required minimum distribution for the year, your IRA charitable rollover gift can satisfy all or part of that requirement.

Charitable Lead Trusts *Provide for your family's future while supporting charity*

- Do you want to benefit from the tax savings that result from supporting 1000 Friends of Oregon, yet you don't want to give up any assets that you'd like your family to receive someday? You can have it both ways with a charitable lead trust. There are two ways charitable lead trusts make payments. A **charitable lead annuity trust** pays a fixed amount each year to 1000 Friends of Oregon and is more attractive when interest rates are low. A **charitable lead unitrust** pays a variable amount each year based on the value

of the assets in the trust. With a unitrust, if the trust's assets go up in value, for example, the payments to 1000 Friends of Oregon go up as well. At the termination of the charitable lead trust, the assets remaining in the trust may be distributed back to your family members.

Donor Advised Funds *A tax-effective way to invest now in your future giving*

- Are you looking for an easy, cost-effective way to support 1000 Friends of Oregon and other causes you love? A donor advised fund, which is like a charitable savings account, may be the right choice for you. Here's how it works. You transfer cash or other assets to a tax-exempt sponsoring organization such as The Oregon Community Foundation. You can then recommend—but not direct—how much and how often money is granted to 1000 Friends or other charities. You qualify for a federal income tax charitable deduction at the time you contribute to the account, and you have the power to make recommendations on which charities to support whenever you want. You centralize your giving and record-keeping in one location. And maybe best of all, you can start a legacy of giving by letting your children help decide which grants to recommend.

Ready to talk about joining the 1000 Friends of Oregon Legacy Club?

1. Contact Executive Director Russ Hoeflich, russ@friends.org, to have a personal conversation about how your planned gifts can make a difference for Oregon and for 1000 Friends.
2. Seek the advice of your financial or legal advisor.
3. Be sure to use our legal name, physical mailing address, and Federal Tax ID on any estate-planning documents:
 - a) **Legal Name:** 1000 Friends of Oregon
 - b) **Address:** 133 SW 2nd Avenue Suite 201 Portland, OR 97204
 - c) **Federal Tax ID Number:** 93-0642086
4. Make it official! Please notify us if you have already arranged for a bequest or other planned gift by completing and submitting this form. We would love to be able to recognize your support!

Thank you for thinking about the future of Oregon!