



## Creating Your Legacy With Outdoor School

### How to Take the Next Steps

#### Step 1: Make an Impact!

Your planned gift will make a significant impact. A \$100 gift annually is very necessary to help a student today, but a \$100,000 planned gift will help students in perpetuity. Both are critically important. Your planned gift can help you realize your dreams and create your legacy. What do you want to accomplish with your gift? Friends of Outdoor School is available to discuss your goals with you.

#### Step 2: Take Action!

Determine how you want to make a gift.

##### Bequest:

###### *Unrestricted gift by bequest*

I give and bequeath to Friends of Outdoor School, an Oregon Corporation located at Portland, Oregon, [written dollar amount, or percentage of the estate or of the residue estate, or description of property], for its general purposes.

###### *Bequest for specific purpose:*

I give and bequeath to Friends of Outdoor School, an Oregon Corporation located at Portland, Oregon, [written dollar amount, or percentage of the estate or of the residue estate, or description of property] for [specific purpose] at Outdoor School. In the event that such use shall become impractical, then for such purpose as the Board of Directors of the Friends of Outdoor School at their discretion shall determine.

##### Retirement Plan Assets or Life Insurance:

Giving all or a portion of your retirement plan assets or life insurance is simple. All you need to do is add Friends of Outdoor School as the beneficiary. You will need your retirement and/or life insurance account numbers (on your statements) and “designation of beneficiary” form. Your account administrator or insurance company will provide you with the correct form. You may also be able to access the form online.

Complete and submit the beneficiary change form directly to your fund administrator or Life Insurance Company. Some key information you may need:

- Name: Friends of Outdoor School, an Oregon Corporation
- Our date of birth (founding): January 6, 2011
- Our date of IRS determination: April 13, 2011
- Use "Other" under relationship
- Our tax identification number: 27-4657069
- Our physical address: c/o MESD ODS, 11611 NE Ainsworth Circle, Portland, Oregon 97220
- Our mailing address: P.O. Box 82684, Portland, Oregon 97282-0684
- Choose primary or contingency beneficiary and allocation percentage\*
- Spouse signature

### **Real Property of Life Income Gifts:**

Your professional advisor will help you plan and arrange your bequests, retirement plan asset and life insurance distributions, real property options, and income gift opportunities.

### **Step 3: Share the Good News!**

When making a legacy gift, please keep in mind the following:

- Always consult your professional advisor about your estate plan.
- Meet with the Friends of Outdoor School Executive Director to align your goals with our giving opportunities.
- Notify Friends of Outdoor School of your decision. We want to thank you and keep in touch.

### **To discuss your estate gift, please contact:**

Kim Silva  
Friends of Outdoor School  
(971) 303-8914  
[Kim@FriendsOfOutdoorSchool.org](mailto:Kim@FriendsOfOutdoorSchool.org)

Our financial advisor:  
Barbara Lochrie  
503-387-3615  
[barb.lochrie@etesianwa.com](mailto:barb.lochrie@etesianwa.com)

Our estate attorney advisor:  
Michelle-Shari Kruss  
503-490-4020  
[michelle-shari@krusslaw.com](mailto:michelle-shari@krusslaw.com)

*This information is intended to share general information. For legal, tax, or other professional advice, please consult your professional advisor.*

\*The primary beneficiary (class I) receives the benefits to be paid when you die. If no primary beneficiary (class I) is living, the benefits go to the contingent beneficiary (class II). If a class includes more than one person, the benefits are divided equally among the living beneficiaries of the class unless you specify otherwise. If none of the beneficiaries is living, the benefits go to your estate. Example: Jane has named her spouse as primary beneficiary at 50% and Friends of Outdoor School as a second primary beneficiary at 50%. If her spouse dies before Jane, 100% of the fund will go to Friends of Outdoor School.