

## Oregon Zoo Foundation: Sample Bequest Language

A well planned gift communicates your legacy; it tells a story of what you hold as most important and valuable in your life and community. Leaving a gift to the Oregon Zoo Foundation through your will or trust is an easy and impactful way to benefit the foundation. The Oregon Zoo Foundation is the independent fundraising agent of the Oregon Zoo and is the preferred designee for estate gifts.

*The sample language provided below illustrates how a bequest can be accomplished, and is intended to be used for educational purposes rather than as legal advice. We encourage donors to share this information with their legal counsel. We also recommend that you review your bequest information with the Oregon Zoo Foundation's planned giving manager to ensure that your plans are carried out as you wish.*

### **For General or Undesignated Support of the Oregon Zoo Foundation:**

"I give . . .

- \_\_\_\_% of my estate,
  - The sum of \$\_\_\_\_,
- or \_\_\_\_% of the rest, residue, and remainder of my estate to . . .  
the Oregon Zoo Foundation, located in Portland, Oregon."

### **For Endowment Fund Gifts:**

You may ***specify an endowment fund*** if you desire to target your bequest toward one of the following areas: **Animal Welfare, Conservation or Education.**

"I give. . .

- \_\_\_\_% of my estate,
  - The sum of \$\_\_\_\_,
- or
- \_\_\_\_% of the rest, residue, and remainder of my estate to . . .

The (Animal Welfare, Conservation or Education) Endowment Fund held by the Oregon Zoo Foundation, located in Portland, Oregon."

### **Beneficiary Designation:**

When naming the Oregon Zoo Foundation as a beneficiary of your retirement plan, IRA, life insurance policy, charitable trust or charitable gift annuity, please use the following information on your beneficiary designation form:

Oregon Zoo Foundation  
4001 SW Canyon Road  
Portland, Oregon 97221  
Federal Tax I.D. Number: 93-0718337

Questions?

Please contact Susan Daigle at 503-914-6209 or [susan.daigle@oregonzoo.org](mailto:susan.daigle@oregonzoo.org)

*Thank you for your support!*