



**Legal Information/  
Language for a Will or Trust**

Legal name: Oregon Wildlife Heritage Foundation  
Tax ID # 93-0797904  
Our address is: 2337 NW York Street, Suite #201C  
Portland, Oregon 97210  
Phone: 503-255-6059  
Email: [info@myowf.org](mailto:info@myowf.org)

**Suggested Bequest Language for a Will or Trust**

1. "I give \_\_\_\_\_ (describe the gift) to the Oregon Wildlife Heritage Foundation [federal tax id # 93-0797904], a nonprofit corporation organized and existing under the laws of Oregon with a principal mailing address of 2337 NW York Street, Suite 201C, Portland, Oregon 97210, for its charitable purposes as defined in and subject to the provisions of the Foundation's Articles of Incorporation as they exist on this date or as they may hereafter be amended (the "Articles"). All assets of this irrevocable gift shall be assets of the Foundation and not a separate trust. The gift shall be received, held and administered subject to the provisions of the Foundation's Gift and Investment Policies, including those provisions which may permit the board to amend, modify, or vary any of the purposes, directions, restrictions, or conditions set forth herein."

If no additional restrictions are to be placed on the gift, only the language in section 1 is required. For placing restrictions on gifts, include both the language in 1. with additional language provided in the samples below under section 2.

2. To indicate a purpose of the gift or to create a named or advised fund, choose the following options:

- a. Conservation Use Restriction. "This gift shall be designated to \_\_\_\_\_." (name an Oregon Wildlife Foundation program, a specific conservation purpose of your gift, or the Oregon Wildlife Foundation Endowment Fund [our operating endowment]).

A gift of \$50,000 or more may be used to create a named fund (see 2b below). A gift of \$250,000 or more may be used to create an advised fund (see 2c below).

- b. Named Fund. For gifts of \$100,000 or more, a named fund can be created. "This gift shall be used to create a named fund to be known as the \_\_\_\_\_ Fund. The purpose of the Fund shall be: \_\_\_\_\_." (describe general or specific purpose, restrictions, etc.)

- b. Advised Fund. (\$250,000 or more) "This gift shall be used to create a named fund to be known as the \_\_\_\_\_ Fund with a purpose of \_\_\_\_\_. Distributions may be made from the Fund as the Board of Directors may determine after taking into consideration any suggestions from time to time made to the Foundation by \_\_\_\_\_ [insert name and contact information of particular person who will advise the Fund]. It is understood that no successor advisors shall be named by the designated advisor listed above."

3. A gift may be a specific dollar amount, a percentage of an asset or the estate, its remainder or a specific asset.
4. Unrestricted gifts will be added to the Oregon Wildlife Foundation Endowment Fund, Oregon Wildlife's general endowment.