



Passionately serving animals and the people they love

5335 SW 42nd Avenue
Portland, OR 97221
(503) 292-6628
www.animalaidpdx.org

Animal Aid Endowment Fund of Oregon Community Foundation

Who We Are

Animal Aid of Portland enhances the welfare of companion animals through individualized care and lifelong commitment, rescue and adoption, resources and education, and community partnerships. We operate a free-roam shelter for cats; a foster program for dogs; It Takes a Pack, a community-driven supply sharing program; and the Animal Aid Cares Fund, a partnership with local veterinarians, behaviorists, and trainers to offer funding for urgent medical or behavioral care. We specialize in assisting animals who may be struggling in larger shelters, as well as Heartstrings Pets: These may be senior animals, animals needing significant medical or behavioral care, or shy animals requiring extra reassurance and time. We commit to the animals we rescue for life, including post-adoption support and a lifelong return policy.

The Endowment Fund

Established in May of 2022, Animal Aid has partnered with Oregon Community Foundation (OCF) to create the Animal Aid Endowment Fund. OCF is a distinguished and trusted charitable resource in our community, and through the creation of this endowment, we are actively building the financial future of Animal Aid. OCF's stewardship and long-term investment program will maintain our endowment fund in perpetuity, providing a stable stream of income to support Animal Aid's mission and programs. Each year, Animal Aid will have the option to receive a 4-5% distribution of our endowment funds. We plan to reinvest these funds until the endowment has reached at least \$250,000, at which time the distribution amount will have grown into a significant resource to our general operations.

Planned Giving Opportunities

This endowment gives our donors the opportunity to designate a gift to this permanent fund and ensure future funding for our work. We also offer the option of creating a life income gift, often called a planned gift. OCF staff works with our staff and donors to create bequests, charitable remainder trusts (CRTs) and charitable gift annuities (CGAs). Assets remaining at the termination of the trust or gift annuity will be designated to a fund that will provide ongoing support for Animal Aid.



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Charitable Trusts & Gift Annuities

Charitable remainder trusts (CRTs) and charitable gift annuities (CGAs) are life income gifts that allow donors to make a gift to Animal Aid, enjoy income for life or for a specified number of years, and obtain an income and estate tax benefit. Assets remaining at the termination of the trust or gift annuity may be directed to a permanent endowment at Oregon Community Foundation to support Animal Aid.

Charitable Lead Trusts

Charitable lead trusts (CLTs) are gifts that allow donors to make a gift to Animal Aid of an income stream for a specified number of years, with the assets of the trust then reverting back to the donor or their loved ones. This allows the donor either to transfer assets to their family with reduced estate and gift tax consequences or allows the donor to take an income tax deduction in year 1 for a gift that will actually be made to Animal Aid over multiple years. Income paid from the trust to Animal Aid may be directed to a permanent endowment at Oregon Community Foundation to support Animal Aid.

Bequests

Bequests are a simple, direct form of planned gift that allows donors to leave a lasting charitable legacy to benefit Animal Aid. Bequests are established through a donor's estate plan, and the estate receives an estate tax deduction for 100% of the gift's value.

Sample Language for a Will or Trust:

I give, devise and bequeath: [DESCRIBE ASSETS FOR BEQUEST] to Animal Aid, tax ID 23-7448353, an Oregon nonprofit corporation.

Beneficiary Designations

A beneficiary designation allows donors to designate Animal Aid to receive an account at the donor's death while still retaining the full use and enjoyment during their lives, as well as continued control over where the asset will be left. Beneficiary designations can be established easily for insurance and retirement accounts, as well as a number of other financial institution accounts like regular savings, checking and brokerage accounts. The asset will not be subject to probate fees and the estate will receive an estate tax deduction for 100% of the gift's value.



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IRA-qualified Charitable Distributions

Donors who want to make a gift to Animal Aid during their lives may be able to make a qualified charitable distribution that will go directly from their IRA to Animal Aid free of income tax consequences. This option is available for donors who are 70 / or older and have a traditional individual retirement account. The transfer can be for up to \$100,000 a year, must be made directly from the IRA custodian to Animal Aid, and the amount distributed will satisfy any required minimum distribution requirements that the donor is subject to for the year of the gift.