



Bequests to the Archdiocese of Portland

The Archdiocese of Portland in Oregon, founded in 1846, provides pastoral support and leadership to Western Oregon's 298,000 Catholics. Through ministries of spirituality, education, service and social justice, the Archdiocese strives to strengthen the faith of Catholics and participate in the advancement of our entire community.

The full legal name of the Archdiocese is:

"Roman Catholic Archbishop of Portland in Oregon, and successors, a Corporation Sole, dba Archdiocese of Portland in Oregon" located at 2838 E. Burnside St., Portland, Oregon 97214.

Please let us know if you plan a bequest to the Archdiocese of Portland in Oregon as we would like to thank you personally.

Please send all communications to the attention of the Office of Resource Development.

Percentage of Estate:

I devise to the Archdiocese of Portland in Oregon, with offices at 2838 E. Burnside Street, Portland, Oregon 97214, _____% of the remainder of my estate for the use and purposes of the (Archdiocese/specify special program.) For this purpose, the remainder of the estate shall mean my estate reduced by debts, claims and expenses, but not by death and succession taxes.

Specified Amount:

I devise to the Archdiocese of Portland in Oregon, with offices at 2838 E. Burnside Street, Portland, Oregon 97214, the sum of \$_____ for the use and purposes of the (Archdiocese/specify special program.)

Residual Amount:

All the rest, residue and remainder of my estate, including real and personal property, wherever situated, I devise to the Archdiocese of Portland in Oregon, with offices at 2838 E. Burnside Street, Portland, Oregon 97214 for the use and purposes of the (Archdiocese/specify special program.)

Sample Will and Trust Language for Various Types of Bequests

The provision in your Will or Trust for making a gift to the Archdiocese of Portland in Oregon will depend upon the type of gift and your unique circumstances. We hope these ideas will be helpful. Please remember that these provisions are only samples. Any provision in your Will or Trust making a gift to the Archdiocese of Portland in Oregon should be reviewed by your estate planning advisor to ensure that it fits your overall estate plan.

I devise (the sum of ___/the residue/ ___percent of the residue) of my estate to the Archdiocese of Portland in Oregon, for the purposes of establishing (*state restricted purpose*).

or

The Trustee shall distribute (the sum of ___/the remainder/ ___percent of the remainder) of the Trust to the Archdiocese of Portland in Oregon, for the purposes of establishing (*state restricted purpose*).

Restricted Gift to Establish Named Endowment Fund (Perpetual Gift)

I devise (the sum of ___/the residue/ ___percent of the residue) of my estate to the Archdiocese of Portland in Oregon, to be used to establish fund, the income from which shall be used (*state use*). This fund shall be known as the “_____ Fund.” This fund, for the purposes of investment, may be combined with other funds of the Archdiocese of Portland in Oregon and administered according to Archdiocesan policies and procedures.

or

The Trustee shall distribute (the sum of ___/the remainder/ ___percent of the remainder) of the Trust to the Archdiocese of Portland in Oregon, to be used to establish fund, the income from which shall be used (*state use*). This fund shall be known as the “_____ Fund.” This fund, for the purposes of investment, may be combined with other funds of the Archdiocese of Portland in Oregon and administered according to Archdiocesan policies and procedures.

Unrestricted Gift to General Endowment Fund

I devise (the sum of ___/the residue/percent of the residue) of my estate to the Archdiocese of Portland in Oregon, to be added to its general endowment fund, or to be used to establish a separate endowment fund. A minimum of 5% of the fund shall be distributed annually, to be used for the benefit of the Archdiocese in such a manner as the Archbishop may elect. The determination of the value of the fund should be its market value on December 31 annually.

or

The Trustee shall distribute (the sum of ___/the remainder/ ___percent of the remainder) of the Trust to the Archdiocese of Portland in Oregon, to be added to its general endowment fund, or to be used to establish a separate endowment fund. A minimum of 5% of the fund shall be distributed annually, to be used for the benefit of the Archdiocese in such a manner as the Archbishop may elect. The determination of the value of the fund should be its market value on December 31 annually.

Gifts of Property (Restricted or Unrestricted)

If real estate and/or artifacts, furnishings, etc. are given the following statement should be incorporated into the Will/Trust language:

The sale and reinvestment of this property shall be determined by the Archdiocese of Portland in Oregon. **(Unrestricted:** The income shall be used for the benefit of the Archdiocese of Portland in Oregon as the Archbishop elects. **Restricted:** The income shall be used for the purposes stated in this Will/Trust.)

Note: *If property is being given, a specific description should always be included.*

In the event the needs of the Archdiocese of Portland in Oregon change, the following clause is recommended for restricted gifts:

Whenever it appears that changing conditions make this plan no longer applicable, practical, or suited to the general purposes stated above, the Archdiocese of Portland in Oregon is authorized to utilize the fund for any other suitable purpose, so that the fund will provide the maximum service to the Archdiocese of Portland in Oregon.

Special Programs and Offices of the Archdiocese of Portland

<p>Special Projects of the Archbishop</p> <p>Archbishop's Catholic Appeal Archdiocesan Cemeteries Archdiocesan Resource Center Archives and Historical Records Campus Ministry Catholic Campaign for Human Development Catholic Deaf Ministry Catholic Relief Services Catholic Schools Continuing Education for Clergy Corrections Ministry Diaconate Ecumenical & Interreligious Affairs Evangelization Hispanic Ministries</p>	<p>Housing Office Human Resources Justice and Peace Marriage, Family Life & Aging Ministry Ministry Formation Mission Office Office for People with Disabilities Oregon Catholic Conference Priests' Retirement Religious Education Resource Development Respect Life Office Seminary Education Tribunal Vocations Worship Youth and Young Adult Ministry</p>
-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

For more information, please contact:

Mary Anne Rees, Planned Giving Associate E-Mail: marees@archdpdx.org

Archdiocese of Portland in Oregon
2838 E. Burnside Street Portland, Oregon 97214
Phone: 503-233-8333 Fax: 503-235-6675

Bequests to a Parish in the Archdiocese of Portland

Please let us know if you plan a bequest to the Archdiocese of Portland in Oregon as we would like to thank you personally.

The full legal name of the Archdiocese is:

“Roman Catholic Archbishop of Portland in Oregon, and successors, a Corporation Sole, dba Archdiocese of Portland in Oregon” located at 2838 E. Burnside St., Portland, Oregon 97214.

Please send all communications to the attention of the Office of Resource Development.

Percentage of Estate:

I devise to the Archdiocese of Portland in Oregon, with offices at 2838 E. Burnside Street, Portland, Oregon 97214, _____% of the remainder of my estate for the use and purposes of the _____ Parish, located at (complete mailing address). For this purpose, the remainder of the estate shall mean my estate reduced by debts, claims and expenses, but not by death and succession taxes.

Specified Amount:

I devise to the Archdiocese of Portland in Oregon, with offices at 2838 E. Burnside Street, Portland, Oregon 97214, the sum of \$_____ for the use and purposes of the _____ Parish, located at (complete mailing address).

Residual Amount:

All the rest, residue and remainder of my estate, including real and personal property, wherever situated, I devise to the Archdiocese of Portland in Oregon, with offices at 2838 E. Burnside Street, Portland, Oregon 97214 for the use and purposes of the _____ Parish, located at (complete mailing address).

Thank you