

CHECK LIST

Steps to enroll your pets in *Friends Forever*™

The Oregon Humane Society's unique Friends Forever program will assist you in making a comprehensive plan to ensure the welfare of your pets.

- Read through the enclosed materials.
- Thoughtfully plan your gift to the Oregon Humane Society. This may take some time.
- Complete a Pet Profile for each pet to be enrolled.
- Complete the Pet Enrollment form.
- Make a copy of the page from your estate document or beneficiary form which shows Oregon Humane Society to be a beneficiary.
- Mail or email all pages to:

Gary Kish, Vice President, Legacy Gifts & Strategic Initiatives
Oregon Humane Society
1067 NE Columbia Blvd.
Portland, OR 97211

Via email to: Legacy@oregonhumane.org

Expect to receive from OHS in 1-2 weeks:

A letter confirming your enrollment.

Wallet card(s) to carry.

Alert sticker for home.

Once received:

- File the confirmation paperwork with your other estate documents.
- Inform friends, family, neighbors and pet care providers about the plan for your pets.
- Contact OHS if you move, have a change of contact information or if there are changes to your planned gift. Keep OHS updated when your pet has a significant health change or when you want to enroll another pet.

WHAT IS *Friends Forever*™ ?

Friends Forever was established as a way for our dedicated supporters and pet owners to make provisions to ensure that any pets which outlive them will be received by OHS, cared for and placed into new homes. The following section provides answers to some of the hard but necessary questions that arise when planning for the care of beloved pets.

Gary Kish, Vice President, Legacy Gifts & Strategic Initiatives
1067 NE Columbia Blvd Portland, OR 97211
(503) 416-2988 Legacy@oregonhumane.org

COMMONLY ASKED QUESTIONS

Can I leave my estate assets to my pets to ensure they are cared for in the event of my death?

In all states, money can only be left to persons and organizations, and cannot be left directly to pets. Instead a caregiver for the pet can be designated and, if desired, a sum of money provided for the animal's care. Special planning is needed when naming a guardian for your pet. It can be difficult to guarantee that at some point in the future the guardian will be able to accept responsibility for your pet or use the money you've provided specifically for their care.

How can the Oregon Humane Society help me provide for my pets in the event of my medical incapacity or death?

In 1994, the Oregon Humane Society developed Friends Forever so that pet owners could ensure the well-being of pets who outlive them. The program is predicated on the pet owner remembering OHS in their estate plan. By designating OHS in a will (or other estate document) and by making a planned gift, OHS will immediately receive, care for and find new homes for your surviving pets.

How can OHS guarantee my pets will find good homes?

The Oregon Humane Society was founded in 1868, and we've been finding compatible and loving homes for pets ever since. We've had 150 years to refine our adoption process to carefully match adopters with pets who fit well within their lifestyle. Friends Forever promises OHS will stand ready to receive your pets compassionately, comfort them during the transition, follow your care instructions, provide any needed medical care and find them loving homes as quickly as possible.

How does OHS ensure my pets find a home where they will be treated with the affection and care they deserve?

OHS carefully screens potential adopters through a one-on-one counseling process. By completing the Pet Profile form, you will be providing OHS with vital information about your pet's lifestyle and care needs. Essential information about dietary preferences, medical history, veterinarian contacts and behavioral history will ensure your animal companion is placed with the best possible match. In addition, the new caregiver will be provided with all the details so that your pet's transition can be as smooth as possible.

What if my pet is older or has special needs?

Whether your pet is young and healthy or older with special needs, the Oregon Humane Society is committed to providing exceptional care and finding loving homes for all. OHS has a long history of caring for ill or injured pets. Our on-site, state-of-the-art animal medical center provides all necessary medications and therapeutic treatments. The Oregon Humane Society's successful and nationally recognized adoption program ensures that Friends Forever pets are matched with a loving new family who can provide the specialized care a pet may need.

Can my future pets be enrolled?

Yes. When new pets enter your life, submit a Pet Profile form for each new pet. We encourage participants to keep their Friends Forever files up to date.

Do all my pets need to be enrolled or can some have another plan?

Your plan can be as unique as your pets. The program can be customized to meet the needs of your particular situation. Just let us know if Friends Forever is the primary or secondary plan for each specific pet.

What kind of planned gift will qualify my pet(s) for Friends Forever? Is there a minimum amount?

There are many options for gifts that will qualify your pets for enrollment. See the “Your Planned Gift” page for the most common options. While we encourage participants to leave a generous gift to support OHS’s future there is no minimum gift amount required. We want everyone who desires to plan for their pets to be able to participate.

What do I need to know about including OHS in my will?

To make certain your will meets legal requirements and to ensure that your wishes will be followed, wills should be created with the assistance of an attorney. To direct a bequest or other planned gift to the Oregon Humane Society we advise the following language:

For the benefit of: The Oregon Humane Society
Federal EIN: 93-0386880
With offices at: 1067 NE Columbia Blvd. Portland OR 97211

Once these provisions are drafted, we recommend Friends Forever participants have OHS review any sections of their will that pertain to pets. There is no charge for this service and the decision is entirely up to you, but experience has taught us that it’s better to identify possible problems while there is still the opportunity to make corrections.

Since the law considers my pets to be personal property, will the probate process delay their adoption?

In 1999, Governor Kitzhaber signed into law the Oregon Humane Society sponsored SB-601, which exempts pets from the probate process. This ensures pets can be quickly transferred into our care for placement in a new home.

Can OHS assist me with estate planning?

Our staff will gladly meet with you and your advisor to discuss the Friends Forever program and/or planned giving options. However, OHS cannot provide tax or legal advice. We strongly recommend you use the services of an estate-planning professional who can analyze your situation and advise you accordingly. OHS can provide you with detailed analyses including revenue projections and the tax effects of various gift options such as charitable gift annuities and charitable remainder trusts.

Do I have to live in Oregon to participate?

Friends Forever is available to anyone living in the continental United States. Distance is not an obstacle; it just takes some planning. The person administering your estate should be prepared to contact OHS and coordinate the transport of your pets. When planning your estate, if you expect your pets to be outside of the West Coast, please contact us to discuss planning for safe and reliable transportation.

What about my privacy?

Be assured that any information you share with OHS remains confidential. We do not sell, trade, or otherwise share donor information. Should your pets be received by OHS, your Friends Forever information will only be available to authorized personnel so we can immediately begin providing the quality care you want your pets to receive. The only information we share with your pet’s new family is the Pet Profile and the “Letter to New Caregiver” you provide.

YOUR PLANNED GIFT

Below are strategies you can use to both benefit the Oregon Humane Society and qualify your pets for the *Friends Forever*™ program.



COMMON PLANNED GIFT OPTIONS

A bequest can be made through a Will or Trust

Use your final words to bring health and security into the lives of homeless pets. You have several options for including your love for animals in your will or trust:

- Specify a dollar amount or property for OHS (Specific Devise)
- Designate a percentage of the total value of the estate for OHS (Percentage Bequest)
- Direct that OHS receive the balance of the estate, or a percentage of what remains, after expenses and other bequests (Residual Bequest)

When preparing a will, OHS encourages supporters to consult an attorney to ensure it conforms with legal requirements. People who are including OHS in a will can call upon OHS to review their draft will. This helps to ensure that their wishes are understood. Of course, there is no charge for this service and the decision to have OHS review the draft will is entirely up to the donor.

Name OHS as Beneficiary of Assets Not Covered by Your Will

Retirement Plans

Animals can't save for retirement like people can, but you can help! Retirement assets like IRAs, 401(k)'s, Keogh Plans, pension or other tax-deferred plans require naming a beneficiary. Naming OHS as beneficiary of these plans is easy and can provide significant tax advantages. OHS is a qualified charity, thus the full value of the account will pass to OHS free of taxes to be used to benefit the animals. Ask your bank or financial institution for a 'beneficiary form' in order to name Oregon Humane Society as a payable-on-death beneficiary.

Certificate of Deposit

One of the simplest and easiest planned gifts. Invest in OHS's compassionate work by purchasing a Certificate of Deposit (CD) at your bank and designating OHS as the payable-on-death beneficiary. The value of the CD is always available should you need it and accrues interest during your lifetime. Afterwards it passes directly to OHS outside of the probate process. If the CD is the type that at the end of its term will automatically renew, confirm with the issuing bank that the beneficiary designation will remain in place.

Life Insurance Policy

If you've been paying on a policy for years but no longer need to provide for dependents, you're in an excellent position to fund OHS programs that alleviate overpopulation at shelters all over the country, saving animals from prolonged stays and euthanasia. You can cash in on those years of payments and save animal lives without using any of your estate's capital. And if you make OHS the beneficiary of a paid-up policy, you may earn an immediate tax deduction equal to the policy's cash value. Contact the policy's issuing agent for instructions and let them know you are saving animal lives.

Charitable Gift Annuity

Oregon Humane Society offers charitable gift annuities. An OHS charitable gift annuity provides fixed payments for life, based upon the donor's age at time of purchase, as well as an immediate tax deduction. It can be for one or two lives. Best for persons age 65 and older. Contact us for details and a personalized gift illustration.

Other Gift Options

There are many types of planned gifts ranging from simple to complex. Some examples are: OHS can be named as the charitable beneficiary of a trust. If you are receiving payments from the sale of a business, real estate, or receiving royalties, you may be able to designate OHS as the successor in interest to receive any payments that continue after your death. We would love to chat with you about a planned gift that fits your specific situation.

How to designate the Oregon Humane Society in a will, trust, other estate document or beneficiary form:

Federal EIN: 93-0386880
With offices at: 1067 NE Columbia Blvd Portland OR 97211
For the benefit of: The Oregon Humane Society

SAMPLE BEQUEST LANGUAGE

This suggested language can be used in your will, trust or other estate papers to direct a planned gift to the Oregon Humane Society and provide for the welfare of your surviving pets. Your attorney may modify this to meet your specific need or situation.

When you make provisions for Oregon Humane Society to care for surviving pets please share this information with OHS so we can be prepared.

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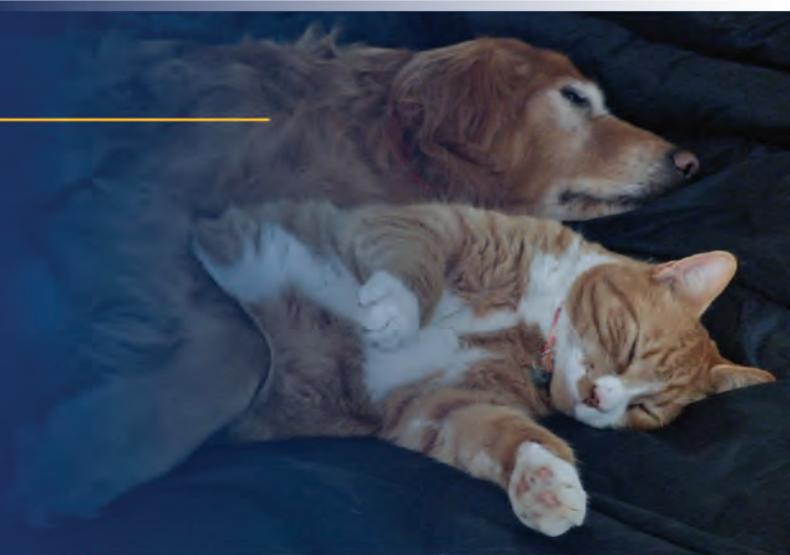
THE OREGON HUMANE SOCIETY *Friends Forever*™ PROGRAM (Care of Surviving Pets)

I wish to provide for the care and welfare of any and all pets that I own at the time of my death. It is my desire that they live the balance of their lives in a stable home environment. Accordingly, I give, devise, and bequeath my pets to my spouse. If my spouse does not survive me:

- A.** I give, devise and bequeath my pets to The Oregon Humane Society (the Society), 1067 NE Columbia Boulevard Portland, Oregon, a nonprofit corporation EIN 93-0386880, to be received by the Society under the auspices of its Friends Forever program.
- B.** In gratitude for caring for my pets, and to support the Society's programs and services I devise, and bequeath {description of bequest} _____ to the Society to be used for its general operations, or as so designated by its board of trustees.
- C.** I request that the Society arrange for the permanent placement of my pets with a member of my family or a family friend. If the Society is unable to do so, I request that it arrange for such placement in a suitable home through the Society's pet adoption program. I understand, however, that adoption may be precluded if a pet is seriously ill or injured, has a vicious temperament, or is for any other reason considered dangerous to an adopter or the public.
- D.** In any event, I request that my pets be cared for and treated as household pets and receive all reasonable care; provided, however, that, in the event of serious illness or injury, I do not desire that extraordinary means be used to prolong their lives; and provided further that the Society may euthanize any pet determined by the Society in its sole and absolute discretion to be seriously ill or injured, to have a vicious temperament or to be a danger to an adopter or the public for any other reason.

PET ENROLLMENT FORM

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EASY STEP BY STEP ENROLLMENT

I would like to enroll the below listed pets in *Friends Forever*™. In the event that I am unable to care for them, I ask that the Oregon Humane Society immediately receive, care for and rehome my surviving pets:

I/We have already included OHS in my/our estate plans.

← Select One →

I/We are in the process of planning a gift from my/our estate to OHS.

Please specify the type of gift you want to make:

Monetary bequest in the amount of \$ _____

Bequest as a percentage of estate _____ %

Other (describe) _____

I/We have made OHS a beneficiary of (check all that apply):

Retirement Account Life Insurance

Bank Account Other (describe) _____

For OHS's planning purposes only, please estimate the approximate future value of your gift \$ _____

Name of person administering your estate who would contact OHS about receiving your pets: _____

Their contact information: _____

Once completed, please return this Pet Enrollment Form, Pet Profile(s) and a copy of the estate document or portion which indicates OHS as a beneficiary, to *Friends Forever*™, 1067 NE Columbia Blvd. Portland, OR 97211

List names of pets to be enrolled: _____

Your Name(s): _____

Your Date(s) of Birth: _____

Address: _____

City/State/Zip: _____

Phone: _____ Email: _____

Signature(s): _____ Date submitted: _____

To recognize your generosity, may we include your name in the list of supporters who plan to make a gift to OHS from their estate?

Yes, please print my name with the growing list of estate gift donors, which will inspire others to follow my lead.

No, I'd prefer my future gift not be publicized at this time.

Has (s)he ever bitten and drawn blood? Yes No If yes, please explain _____

Have you ever petted or approached your dog when (s)he is eating? Yes No

If yes, what is the response? _____

Can you take toys or food out of your dog's mouth if (s)he has stolen something? _____

Who can safely do this? _____

Is your dog's behavior better or worse with particular people (*i.e. people in uniforms, small children, etc.*)? _____

Has your dog ever killed any other animal? Yes No If yes, what species? _____

Does your dog chase any of the following (*check all that apply*)? Adults Kids Squirrels Cats
 Bicycles Cars Other _____

Is your dog aggressively protective of his/her (check all that apply):
 Food Home Car Family Bed Toys

Please describe what daily exercise your dog is given _____

What commands does your dog know? _____

How do you get him/her to respond (*i.e. treats, praise, whistle, voice, hand signals, etc.*) _____

How often do you bathe your dog? _____ Trim his/her nails? _____ Take him/her to a groomer? _____

SECTION C: Specifics About Your Cat

(Complete this section if your pet is a cat. For other animals, skip to Section D.)

Does your cat use a litter box? Yes No If no, please explain _____

Does (s)he spray? Yes No Is your cat declawed? Yes No

Does your cat use a scratching post? Yes No If your cat lives indoors, does (s)he ever go outside? Yes No

How long does it take your cat to adjust to new situations? _____

Where is your cat's favorite place to nap? _____

What qualities describe your cat (*check all that apply*)? Shy Friendly Nervous Unsociable
 Reserved Independent Affectionate Social Playful Energetic Curious

Has your cat ever bitten? _____ Trim his/her nails? _____ Take him/her to a groomer? _____

SECTION D: Specifics About Your Rabbit, Bird, Rodent, etc.

(Complete this section for pets other than dogs or cats.)

What kind of housing does your pet have (*wire cage, glass aquarium, etc.*)? _____

What special needs does your pet have (*special diet, heat lamp, etc.*)? _____

What do you feed your pet (*be specific, hay, vegetables, fruits, nuts, seeds, etc.*)? _____

Does your pet need any special grooming? Yes No If yes, please describe _____

Does (s)he drink water from a bottle or dish? _____

Does your pet like to be handled? Yes No If yes, what's the best way? _____

If your pet is a rabbit, does (s)he use a litter box? Yes No Does (s)he live indoors? Yes No

PET PROFILE

Finding your beloved animal companion the best guardian when you can no longer care for them is important to us. Filling out this form will assist us in finding your pet the best home possible. Use a separate form for each pet that you want to enroll in the *Friends Forever* program. If you need additional forms you may photocopy this one or contact Gary Kish, Vice President, Legacy Gifts & Strategic Initiatives at (503)416.2988: Legacy@oregonhumane.org **Attach additional sheets as necessary.**



SECTION A: Basic Information About You and Your Pet

(Please fill out this section completely.)

Pet owner's name _____ Email Address: _____

Address _____

City/State/Zip _____ Phone _____

Personal Representative (*Family, Attorney, etc.*) _____ Phone _____

Pet's name _____

Please describe your pet's physical attributes (*i.e. breed, color, weight, eye color, short/long-haired, distinguishing markings, etc.*) _____

_____ (Please attach a color photo of your pet if available.)

Type of animal (*check one*) Dog Cat Rabbit Other, please specify _____

Sex of pet (*check one*) Male Neutered Male Female Spayed Female

Pet's Date of birth _____ How long has this animal lived with you? _____

Does your pet have a microchip?
 Yes, If yes, what is the company & number of the chip? _____
 No

List five important things a new guardian should know about your pet? _____

What beliefs/philosophy about appropriate care would you like your pet's new guardian to have in common with you (*i.e. Pets should be treated like members of the family*)? _____

The information about my pet supplied on this form is accurate as of (*date*) _____

Is your pet covered by pet insurance? Yes No Policy # _____

(continued on inside)

Your Pet's Lifestyle

How would you describe your pet's current living situation (*i.e. very quiet, few visitors, noisy, busy, frequent visitors*)?

Where does your pet primarily live? Indoors Outside Other _____

Describe the ideal home for your pet (*attach additional sheets if necessary*) _____

What do you think would help your pet adjust to a new home? (*favorite toy, blanket, etc.*) _____

How would you describe your pet's personality? _____

Describe any bad manners your pet has _____

List three things your pet loves _____

List three things your pet dislikes/is afraid of (*i.e. thunder, fireworks, dogs, etc.*) _____

Is there any part of your pet's body that (s)he doesn't like touched? _____

What has your pet done to show you (s)he doesn't like it? _____

Describe your pet's daily schedule (*include feeding time, walks, exercise, etc.*) _____

What do you feed your pet (*be specific: brand name, canned, dry, table food, treats, etc.*)? _____

How much food do you feed your pet? _____

When do you feed your pet (*once daily, twice daily, P.M., A.M.*)? _____

What are his/her favorite activities? _____

Does (s)he have any favorite toys/games? _____

Where does your pet sleep at night? _____

Where is your pet when you are home? _____

For how many hours each day does a person interact with your pet? _____

Where do you leave your pet when you're not home? _____

What is the longest period of time your pet spends alone? _____

Does your pet travel well in the car? Yes No Does your pet go with you on vacation? Yes No

If no, how do you care for him/her (*which boarding kennel, pet sitter, etc.*)? _____

Your Pet's Health

Who is your pet's veterinarian? _____ At which clinic? _____

What is your pet's behavior at the vet? Scared/Nervous Friendly Aggressive Other _____

Does your pet have any allergies? Yes No If yes, please list _____

Does your pet have any medical/health condition(s) we should know about? Yes No

If yes, describe _____

Does your pet need any medications? Yes No If yes, please list _____

Your Pet and Children

Has your pet lived with children? Yes No If yes, what ages? _____

Has your pet visited with children? Yes No If yes, what ages? _____ How often? _____

Is your pet good with children? Yes, always Only sometimes No, never

Describe circumstances when your pet is not good with children (*i.e. eating, sleeping, etc.*) _____

How does your pet behave around children generally? Playful Friendly Tolerant Afraid

Shy Too Rough Hides Aggressive Other _____

Your Pet and Other Animals

What types of animals has your pet lived with (*please include sex, age, species, etc.*)? _____

Please describe how they got along _____

Does (s)he spend time unsupervised with these pets? Yes No

Is your pet bonded to any other animals in your household? Yes No If yes, who? _____

What types of animals has your pet visited/played with? _____

How does (s)he behave around pets outside of your family (*check one*)? Ignores Plays with Aggressive behavior

Describe circumstances when your pet is not good with other animals (*i.e. eating, attention given to other animal, etc.*)? _____

SECTION B: Specifics About Your Dog

(Complete this section only if the pet is a dog. If the pet is a cat skip to Section C, for other animals skip to Section D.)

Do you trust your dog loose indoors, unsupervised? Yes No If no, why? _____

Do you trust your dog outside unsupervised? Yes No If no, why? _____

What type of confinement do you use when your dog is outside (*fenced yard, runner, etc.*)? _____

Is your dog housetrained? Yes No If no, please explain _____

How does your dog tell you (s)he needs to go potty? _____

Have you ever used a crate for training your dog? Yes No If yes, when and why? _____

What is your dog's reaction to visitors at the door? _____

How long does it take him/her to calm down when someone comes to the house? _____

Has your dog ever nipped at anyone? Yes No If yes, who? _____

If yes, under what circumstances? _____ (Continued on back)

LETTER TO NEW CAREGIVER

You may use this page to write a personal note to the new caregiver of your pet.
Or to include any information that is additional to what is in the Pet Profile.

Attach additional pages if necessary.

This is optional and will not affect the placement of your pet.

