

Friends Forever™ CHECK LIST

Oregon Humane Society's unique **Friends Forever™** program will assist you in making a comprehensive plan to ensure the welfare of your pets. **Follow these steps to enroll your pets.**

STEP 1: Prepare Your Materials

- Read through the enclosed materials
- Thoughtfully plan your gift to Oregon Humane Society. This may take some time.
- Complete a **Pet Profile** for each pet to be enrolled.
- Complete the **Pet Enrollment Form**.
- Write a **Letter to New Caregiver** (optional).
- Make a **copy of the page from your estate document or beneficiary form** which shows Oregon Humane Society to be a beneficiary.

STEP 2: Send Your Materials to OHS

- Mail the items listed above in blue to:**

Friends Forever Program
Oregon Humane Society
1067 NE Columbia Blvd.
Portland, OR 97211

Or email your materials to:
legacyteam@oregonhumane.org

STEP 3: Finalize, Communicate, and Update Your Plans

In 1-2 weeks, you will receive from OHS:

- Letter confirming your enrollment
- Wallet card(s) to carry
- Alert sticker for your home

Once you receive your materials from OHS:

- 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*™ ?

Oregon Humane Society's *Friends Forever*™ program 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, loving homes. The following section provides answers to some of the hard but necessary questions that arise when planning for the care of beloved pets.



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, 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?

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, 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. OHS' 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' 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 Oregon Humane Society, we advise the following language:

Federal EIN: **93-0386880**

With offices at: **1067 NE Columbia Blvd., Portland, OR 97211**

For the benefit of: **Oregon Humane Society**

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 Oregon Humane Society and qualify your pets for the **Friends Forever™** program.



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: **Oregon Humane Society**

With questions, or to inform OHS about your planned gift, please contact:

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

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 through our **Friends Forever™** program. 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.



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 Oregon Humane Society (OHS), 1067 NE Columbia Boulevard, Portland, Oregon, a nonprofit corporation EIN 93-0386880, to be received by OHS under the auspices of its Friends Forever program.
- B. In gratitude and to support OHS's programs and services, I devise and bequeath {description of bequest} _____ to OHS to be used for its general operations, or as so designated by its board of directors.
- C. I request that OHS arrange for the permanent placement of my pets with a member of my family or a family friend. If OHS is unable to do so, I request that it arrange for such placement in a suitable home through OHS'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 OHS may euthanize any pet determined by OHS 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.

With questions, or to inform OHS about your planned gift, please contact:

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

Friends Forever™ ENROLLMENT FORM

RETURN THIS FORM TO:

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



Easy Step By Step Enrollment

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

Name(s) of each pet being enrolled: _____

Your Name(s): _____

Your Birth Date(s): _____

Address: _____

City: _____ State: _____ Zip Code: _____

Telephone: _____ Email: _____

Please Select One: I/We have already included OHS in my/our estate plans.

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

Please specify the type of gift you have made/intend to make:

Monetary bequest in the amount of \$ _____

Bequest as a percentage of estate _____ %

Other (describe) _____

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

Will or Trust

YOUR ATTORNEY'S INFORMATION

Name: _____

Firm: _____

Address: _____

Telephone: _____

Email: _____

Beneficiary Designation

FINANCIAL ACCOUNT INFORMATION

Account Type:

Checking

Savings

CD

Retirement

Annuity

Pension

Life Insurance

Other: _____

Financial Institution: _____

Last Four Digits of Account Number: _____

Percentage of the account designated to OHS: ____ %

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

Signature/Date: _____ Signature/Date: _____

Contact information for person administering your estate who will contact OHS about receiving your pets:

Their Name(s): _____

Address: _____ City: _____ State: _____ Zip Code: _____

Telephone: _____ Email: _____

Once completed, please return all three of these documents to the address listed on the front:

1. This Pet Enrollment Form
2. Pet Profile(s)
3. Copy of the estate document or portion which indicates OHS as a beneficiary

After we have received the three documents listed above, to honor your commitment and inspire others to make legacy gifts, may we add your name to listings of OHS estate gift donors?

- Yes, OHS may print my name as an estate gift donor.
- No, I would prefer not to be recognized as a donor of a future estate gift at this time.

Thank you for entrusting OHS with the care of your pets when they need it. Your generosity ensures animals will receive the care and protection they need for years to come.

PET PROFILE



Finding your beloved animal companion the best caregiver 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 or legacyteam@oregonhumane.org. Attach additional sheets as necessary.

SECTION A: Basic Information About You

Please fill out this section completely.

Pet owner's full name _____ Email _____

Street Address _____

City _____ State _____ Zip _____ Phone _____

Personal Representative (family, attorney, etc.) _____ Relationship _____

Representative's Address _____

Representative's Email _____ Representative's Phone _____

SECTION B: Basic Information About Your Pet

Please fill out this section completely. Use a separate form for each pet that you want to enroll.

Pet's name _____

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

Pet's breed _____ Approximate date of birth _____ Adoption date _____

Describe your pet's physical attributes. (breed, color, weight, eye color, short/long-haired, distinguishing markings, etc.) _____

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

Pet's sex (check one) Male Female Is your pet spayed/neutered? Yes No Unsure

Does your pet have a microchip? Yes (company and chip number) _____ No Unsure

Where did you acquire this pet? Oregon Humane Society Other Shelter/Rescue Stray Friend/relative

Born in home Store/breeder Other _____

Is your pet covered by pet insurance? Yes (policy #) _____ No

SECTION C: Your Pet's Health / History

Please fill out this section completely. Use a separate form for each pet that you want to enroll.

What would you like new owners to know about this pet? _____

What is the name of the pet's Veterinarian and clinic? _____

Does your pet have any medical or health conditions or allergies? _____

Does your pet take any medications? (please list) _____

Are there places on the pet's body he/she does not like being touched, brushed or petted? (check all that apply)

Ears Feet Head Stomach Tail Other (please specify) _____ None of the above

How would you describe your dog most of the time? (check all that apply)

Affectionate Playful Lap dog/cat Worried Friendly with visitors Shy with family Shy with visitors Nervous

Independent Very active Not very active Talkative Reactive/Feisty Uses mouth/jumps up in play

What are your pet's favorite things to do? (favorite toys, treats, and/or activities) _____

What do you feed your pet? _____

Describe your pet's schedule. (including mealtime, walks, play time, etc.) _____

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

Does your pet live with any of the following? (check all that apply)

Large dogs Small dogs Cats Small animals Livestock Children

Would you recommend placing this pet in a home with other dogs? Yes No More information (optional) _____

Would you recommend placing this pet in a home with cats? Yes No More information (optional) _____

Would you recommend this pet be around children regularly? Yes No More information (optional) _____

Has this pet ever bitten anyone or any animal? Yes No More information (optional) _____

SECTION D: Specifics About Your Dog

Complete this section only if the pet is a dog. For cats, skip to Section E. For other animals, skip to Section F.

What words does your dog understand? (check all that apply)

Sit Stay Down Come Leave it Drop Wait Heel Off Other

How does your dog travel in the car? _____

How does your dog do on leashed walks? _____

Where does the dog stay when no human members of your family are at home?

Free roam of the house Confined particular room Crated Outside Other _____

Does your dog ever escape the yard? Yes No

Describe your dog's housetraining.

No accidents Occasional accidents Urinates inside home Defecates inside home Other _____

Is this dog possessive or protective? Yes (example) _____ No

Describe your dog's play style with other dogs. (check all that apply)

Will play with all dogs Does not enjoy playing with other dogs at all

Picky about the dogs they like Hangs out with other dogs rather than plays Plays rough with other dogs

Chases or herds other dogs Barks constantly Prefers dogs that are gentle or indifferent

Do any of the following frighten your dog? (check all that apply)

Babies or toddlers School-age children Teenagers Men Women

Strangers/visitors People in uniform Veterinarian/groomer Loud voices/yelling Fireworks/loud noises

Erratic or sudden movement Water Unpredictable children Broom/vacuum Riding in car Loud vehicles

Has this dog done any of the following when interacting with adults, children or visitors in the home?

Barked at Growled Snapped Bitten None of the above

Has the dog done any of the following with a vet or groomer?

Barked at Growled Snapped Bitten None of the above

Has this dog done any of the following with pedestrians, cars, bikes or skateboards?

Barked at Growled Snapped Bitten None of the above

Has this dog done any of the following with resident dogs or cats?

Barked at Growled Snapped Bitten None of the above

SECTION E: Specifics About Your Cat

Complete this section only if your pet is a cat. For other animals, skip to section F.

Is your cat declawed? Yes No Unsure

Do you trim your cat's nails or take your cat to the groomer? Myself Groomer Other (please specify) _____

Does your cat use a scratcher? Yes No Other (please specify) _____

What areas does your cat have access to? Indoors only Outdoors only Indoor/Outdoor Other (please specify) _____

Does your cat have access to a litter box in the house? Yes No Other (please specify) _____

How many cats share the litter box? _____

Does your cat urinate or defecate outside of the litter box? (litter box misuse) Yes No Other (please specify) _____

SECTION F: 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 (please specify) _____ No

Do they 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, do they use a litter box? Yes No Do they live indoors? Yes No

SECTION G: Is there anything else you would like us to know?

LETTER TO NEW CAREGIVER

You may use this page to write a personal note to the new caregiver of your pet(s) or to include any information in 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.

RETURN THIS FORM TO:

Planned Giving Office
1067 NE Columbia Blvd.
Portland, OR 97211
(503) 416-2988
legacyteam@oregonhumane.org

