



## Portland Friends of the Dhamma

Portland Friends of the Dhamma  
1404 SE 25th Ave  
Portland, OR 97214

Dear Friend of the Dhamma,

Thank you for considering Portland Friends of the Dhamma in your estate plans. There are many approaches to this, such as through your will, retirement plan, life insurance and so on. We deeply appreciate that you would consider providing for PFoD in this way.

The enclosed documents are for educational purposes, for you to discuss with your legal and financial advisors. If you have any questions or would like to discuss further details, I look forward to having the chance to talk with you. Please contact me at [gsatir@pdxdhamma.org](mailto:gsatir@pdxdhamma.org) or (503) 233-6498.

Sincerely,

Gregory Satir  
Development and Fundraising  
Committee Chair

**PFoD is a 501(c)(3) religious nonprofit with tax ID #20-8808159  
1404 SE 25th Ave • Portland, OR 97214 • [pdxdhamma.org](http://pdxdhamma.org)**



## Securing PFoD for Future Generations

**Ever since the Buddha's time**, each generation has passed on his teachings to the next. It's an unbroken chain that includes Portland Friends of the Dhamma. Imagine joining this chain of generations by planning a gift to PFoD through your estate. This can be easier to do than you might think. There are two common approaches:

- 1 **A will** is the most common and flexible way to plan an estate. We can provide some sample language that may help you and your attorney address your goals.
- 2 **A retirement plan, life insurance, brokerage or bank account** often allows you to name a beneficiary. This is who receives the assets upon the death of the account holder. Contact your plan administrator to request a "change of beneficiary" form.

**Ancient monasteries** have inscriptions illustrating the generosity and compassion of their donors. As we pass on from this life, we can join these ancient donors, leaving an enduring gift for future generations. We appreciate that you are considering such a gift to PFoD. ■

### Here's what your gift helps us provide:

- Contact with monastic & lay teachers
- Weekly classes and workshops
- A strong kids program
- A beautiful and well-maintained building
- A refuge in the city

You can restrict your gift to a particular purpose. If you want to restrict your gift, it is important to consult with PFoD to ensure that the proposed restriction can be honored.

*"Portland Friends of the Dhamma gives a tremendous resource to the community, and many people benefit. For people that do have resources, you're not really asking, but giving people the opportunity to support something really useful."*  
— Luang Por Pasanno

If you have questions contact Gregory Satir, Development and Fundraising Committee Chair, at [gsatir@pdxdharma.org](mailto:gsatir@pdxdharma.org) or (503) 233-6498.



Portland Friends of the Dhamma

## Letting PFoD Know About a Planned Gift

If you include Portland Friends of the Dhamma in your estate plans, we invite you to complete this form with as much detail as you are willing to share. Any information you provide will remain confidential and does not create a binding obligation. By sharing your intentions, we can ensure your wishes for your gift are met.

Name(s) \_\_\_\_\_

Address \_\_\_\_\_

Email \_\_\_\_\_ Phone \_\_\_\_\_

I have named PFoD as a beneficiary of my:

Will  Retirement Plan  Life Insurance  Other \_\_\_\_\_

*If you wish to restrict your gift to a specific purpose, it's important to consult with PFoD to ensure that the proposed restriction can be honored.*

PFoD is a primary beneficiary

PFoD is a secondary/contingent beneficiary

Estimated amount of gift (optional) \_\_\_\_\_

You may publish my name as a member of the Legacy Circle

I wish to remain an anonymous member of the Legacy Circle

Signature \_\_\_\_\_ Date \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

*PFoD recognizes that this gift is subject to change depending on personal circumstances. This form is not intended to be legally binding and all information will remain confidential. Return this completed form and direct any questions to:*

Gregory Satir, Development and Fundraising Committee Chair  
1404 SE 25th Ave • Portland, OR 97214  
gsatir@pdxddhamma.org • (503) 233-6498



## Sample Language for Your Will

This language may help you and your advisors reach your estate planning goals. Your gift can be a specific sum or an asset, like stocks, real estate or personal property. It can also be a percentage of your estate, allowing your giving to adjust with your changing life circumstances. Here is some sample wording:

“I give, devise and bequeath to Portland Friends of the Dhamma (tax ID #20-8808159), an Oregon non-profit corporation, or its successor in interest,

- the sum of \$ \_\_\_\_\_, **OR**
- the personal property described as \_\_\_\_\_, **OR**
- the real property described on the deed as \_\_\_\_\_, **OR**
- \_\_\_\_\_ % of my entire estate, **OR**
- \_\_\_\_\_ % of the rest, residue and remainder of my estate,  
after all expenses and other specific bequests are satisfied

to be used for its general purposes.”

We appreciate that you are considering including PFoD in your estate plans. These gifts are vital to continuing our mission. ■

### **Giving for a specific purpose**

If you want to restrict your gift to a specific purpose, it's important to consult with PFoD to ensure that the proposed restriction can be honored.

### **Taking care of loved ones**

You can design your gift to take effect only if someone else is no longer living or provide income to a loved one, with a gift to PFoD after that person's lifetime. Talk to your advisor about these options.

*“The aspiration to share such precious teachings with others is a natural step to take, one that accounts for the Dhamma being handed down through each generation since the Buddha's time.” — Ajahn Achalo*

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