

# CONFIDENTIAL BEQUEST INTENTION FORM

I have made a provision for OPB in my estate plans. My bequest is revocable and my estate plans may change.

1. I have named OPB as a beneficiary of my:

- ☐ Will/Living Trust
- ☐ Retirement Plan
- ☐ Life Insurance Policy
- ☐ Charitable Gift Annuity
- ☐ Charitable Trust

2. My bequest to OPB is in the specific amount of \$ \_\_\_\_\_  
or

My bequest to OPB is a percentage of my estate plans.

- The percentage is \_\_\_\_\_%
- The estimated current value of my estate gift to OPB is \$ \_\_\_\_\_

3. I last updated my will or trust, or updated the beneficiary designation forms, to include a gift to OPB in (month/year) \_\_\_\_\_

4. OPB's use of my bequest is:

- ☐ Unrestricted to be used for OPB's general charitable purposes.
- ☐ I am interested in supporting a specific genre of content provided by OPB (please contact the OPB Philanthropy team at 503.293.1935 to discuss this option and ensure that OPB can execute your bequest intentions in accordance with your wishes).

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

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

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

- ☐ Please send me details about being recognized in the OPB Legacy Society
- ☐ I prefer to remain anonymous

It is helpful for OPB to retain a copy of the language in your will or trust, or beneficiary designation forms, pertaining to OPB. We encourage you to return of copy of the relevant pages with this form.

For more information or questions, please contact:

Julie Feely  
Director of Philanthropy  
jfeely@opb.org  
503.293.1935

Please return form to:  
Office of Philanthropy, OPB  
7140 SW Macadam Avenue  
Portland, OR 97219

