



Sample Language for Estate Planning

Basic Rights Oregon and Basic Rights Education Fund are affiliated, but separate organizations. Basic Rights Education Fund is a 501c3 organization dedicated to education and community engagement; gifts to the Education Fund are tax deductible to the full extent of the law. Basic Rights Oregon is a 501c4 organization that engages in political and lobbying efforts; gifts to Basic Rights Oregon are not tax deductible.

When you're deciding how to leave a legacy for fairness and equality, the tax consequences of a particular gift may be a consideration. If the tax consequences of your gift are not a consideration, donations to Basic Rights Oregon give us the greatest flexibility in putting your gift to work on behalf of LGBTQ equality in our state. Either way, your gift is immensely appreciated, and will be dedicated to carrying your values and beliefs forward long into the future.

To leave your gift to Basic Rights Oregon (non-tax-deductible), use the following language:

"I give and bequeath _____ (dollar amount, percentage of residuary estate, etc.) to Basic Rights Oregon (Federal Tax I.D. 93-1108531), located at PO Box 40625, Portland, OR 97240."

To leave your gift to Basic Rights Education Fund (tax-deductible), use the following language:

"I give and bequeath _____ (dollar amount, percentage of residuary estate, etc.) to Basic Rights Education Fund (Federal Tax I.D. 93-1266613), located at PO Box 40625, Portland, OR 97240."

To designate Basic Rights Oregon (non-tax-deductible) as a beneficiary of a retirement plan, life insurance policy or other financial account, please use the following information:

Basic Rights Oregon (Federal Tax I.D. 93-1108531), located at PO Box 40625, Portland, OR 97240.

To designate Basic Rights Education Fund (tax-deductible) as a beneficiary of a retirement plan, life insurance policy or other financial account, please use the following information:

Basic Rights Education Fund (Federal Tax I.D. 93-1266613), located at PO Box 40625, Portland, OR 97240."

For More Information:

Mikki Gillette, Major Gifts Officer: mikki@basicrights.org; (503) 222-6151 x141

The above information is provided as a courtesy for use with your attorney and does not constitute legal, tax or financial advice. Basic Rights Oregon encourages you to seek professional legal, estate planning and financial advice before deciding on a particular gift arrangement.