



Seeding Our Future

L'Arche Nehalem
8501 SE Stephens
Portland, Oregon

Leave Us a Legacy

We have all given time, talent, money, or prayers to L'Arche Nehalem. But few of us may have thought of making a gift that will work wonders long after we are gone.

By leaving a gift to L'Arche in your Will or Estate Plan, you ensure that your assets will continue to help long after you are not here. And because of tax benefits, a charitable contribution in your Will can also benefit the family and friends who inherit your Estate.

You might think you have to be wealthy to have an Estate or to leave a gift. Not true: an Estate is simply any property, money, or personal belongings you may have at the time of your death. Anyone can arrange to leave a charitable gift from their Estate, regardless of Estate size.

There are many ways to leave a gift. You can set aside a certain dollar amount or a percentage of your Estate in your Will. You can leave a life insurance policy or investment by designating L'Arche Nehalem as a beneficiary. Or you may donate real or personal property, such as a car or a valuable collection.



LEAVE A LEGACY™

What is a “planned gift?”

Planned gifts usually take the form of a bequest, either through a Will or Trust, or through beneficiary designation in an insurance policy or retirement IRA funds.

Planned gifts can take the form of cash, publicly traded securities, closely held securities, mortgages and notes, or real or personal property convertible to cash.

L’Arche Nehalem has created an Endowment Fund to receive your planned gift and put it to good use.

Our Endowment Fund is designed to provide L’Arche Nehalem with long-term financial stability, security, and growth. And we have put policies and controls in place that assure you that we will serve as a faithful and responsible steward of your gift.

We welcome the opportunity to discuss planned giving questions and options with you. Just call our office at 503.251.6901. You can request a copy of our Endowment fund policies and our Annual Report by calling or visiting our website at www.larche-portland.org.



How will my gift be used?

Your planned gift will be placed in the L'Arche Nehalem Endowment Fund. We will invest your gift, and spend the investment earnings only each year. The principal, or "corpus", of your gift will remain untouched and be continually reinvested. In this way, your planned gift will be a perpetual gift, a lasting legacy that will provide benefits to L'Arche for many years to come.

Our Endowment Fund is invested with the goal of preserving capital. This means that your gift will be invested in highly reputable, low-risk investment instruments, such as money market funds or certificates of deposit.

Earnings from the Fund's investments will be used to support special needs and programs of L'Arche Nehalem, such as funding for residents with developmental disabilities who lack financial resources.



Can I be sure that my gift will be safeguarded?

With the advice of experts, we have put policies in place to ensure faithful and responsible stewardship of your gift now and in the years to come. These policies include a gift acceptance policy, a policy that governs Endowment Fund administration and use, and a fund investment policy.

The policies include a number of safeguards and controls, such as:

- Careful investing of gifts to preserve capital. Investments will be made only in highly reputable, largely risk-free money market fund and CDs.
- Regular, timely reporting of the Fund's investment performance and the Board's spending decisions.
- Tight controls on spending Fund assets. Spending is capped at no more than each year's investment earnings. And spending may only be used for L'Arche Nehalem purposes.
- Independent financial audits once the Fund has grown in size.

L'Arche Nehalem runs a tight ship financially. Our administrative costs and debt load are low, meaning that donations are dedicated to creating a healthy, nurturing environment for those who call L'Arche home.

Planting the Seed

If you do not have a Will, we urge you to see an attorney to draft one. If you haven't updated your Will in the last few years, we encourage you to do so. While we do not make recommendations, we would be happy to provide you with a list of attorneys, financial planners, and other estate planning experts in our area.

To ensure that funds revert to L'Arche Nehalem, we encourage you to use this language in your Will or other Estate plan document:

I devise to L'Arche Nehalem, whose legal name is L'Arche Nehalem, Inc., an Oregon non-profit corporation, the sum of \$_____ (or _____% of my estate) to be used for carrying out its mission. L'Arche Nehalem's tax ID number is 93-0885766.

You may wish to designate L'Arche Nehalem as a beneficiary of your life insurance policy, or of your IRA account, KEOGH account, or other pension or retirement funds. Often, this is the simplest, most straightforward way to leave a gift. We urge you to consult a professional if you have questions on completing a beneficiary form.

L'Arche Nehalem is also prepared to accept irrevocable or revocable trusts, life estates, charitable remainder annuity and unitrusts, and charitable lead trusts.

