



# How to Include the Opera in Your Will

**It is simple to create a lasting artistic legacy that will continue supporting Portland Opera and other institutions you love for many years to come. You can do so by simply including the Opera in your will or by modifying a will you already have.**

## If you are writing or revising your will . . .

You can include Portland Opera in your will in three different ways:

- a specific dollar amount
- a percentage of your estate.
- the *residual* (or a percentage of the residual) of your estate – what is left over after all of your other obligations and your family and friends are provided for.

We prefer that you take care of your family, friends and other loved ones first and name Portland Opera as your residual beneficiary. Here's a sample of what your will may say:

*"I hereby give, devise and bequeath Portland Opera Association, Inc., a not-for-profit corporation, duly organized and existing under the laws of the State of Oregon, the sum of (select one)*

- \$ \_\_\_\_\_ OR
- \_\_\_\_\_% of my estate, OR
- a description of specific property, OR
- the rest, residue and remainder of my estate

*to be owned, held and used by Portland Opera for its endowment OR for unrestricted purposes approved by the Board of Directors."*

## If you have an existing will . . .

If you already have a current will, you can leave a bequest to the Opera by simply adding a ***codicil*** to your will. A codicil is a simple one-page amendment to your will that specifies the gift you would like to make, and it does not require changing anything in your existing will. Your attorney can help you write your codicil (you'll find a sample on the reverse).

It's very easy to make a bequest to Portland Opera, but be sure to consult with your attorney to write your actual will or codicil, and please let us know of any plans you have made so we can recognize you as a member of Portland Opera's Legacy Society.

*Always consult your attorney or financial planner before making changes to your estate plan.  
For more information on including Portland Opera in your will or estate plan,  
contact the Opera's Director of Development Peter Bilotta at (503) 241-1407, extension 263.*