

DANA FOR AITKEN RŌSHI CAMPAIGN

Questions and Answers

How do I make an annual pledge or donation? You can make a pledge and donation by mail using the enclosed form. Make checks payable to "Friends of Robert Aitken." You may also make a donation online using our website, www.AitkenRoshi.org. Further instructions and information are on the enclosed form and the website.

How much money is needed? Our goal is to substantially defray the additional cost for the individual care Rōshi now receives at Pālolo (as opposed to the cost of a care home) and to pay the part-time salary of his care coordinator/assistant. For the level of care Rōshi now requires, a good care home in the Honolulu area would cost between \$5,000 - \$6,000 per month. The current cost of Rōshi's individual care at Pālolo, plus the salary of his part-time care coordinator/assistant is about \$14,000 per month. Thus our goal is to defray as much as we can of the approximately \$8,000 - \$9,000 per month in additional cost for Rōshi's care at Pālolo.

What is Rōshi's financial situation? Rōshi still has significant assets but they are being rapidly depleted. As of mid-2007, his total financial assets were in the mid-six figure range. He sold his home on the Big Island when he moved to Oahu in 2004 so these cash assets are all he has. He receives some income from the investment of his assets and from social security and this all goes toward his care. Without assistance and assuming the current rate of expenditure for his care and his medical and living expenses, Rōshi would be completely out of money in a little over 4 years. In the more likely event that these expenses increase significantly in the future, Rōshi could run out of money within two years or less. We don't want to wait to see if this happens so we are asking for your pledge of assistance now.

Who are the *Friends of Robert Aitken*? We are friends and former students of Rōshi located around the globe. Some of us have never met him but have read one or more of Rōshi's books or articles and been inspired. What ties us together is our gratitude for Rōshi's teaching and our commitment to assist him financially at this time of his life. Our wish is to form a community of support for Rōshi that allows him to remain at Pālolo with the best care possible and to assuage his concern about running out of money.

Why are annual pledges requested? Your pledge of assistance establishes you as part of Rōshi's community of financial supporters and will help us to assess our ability to support Rōshi in continuing to live at the Pālolo Zen Center as he wishes. Those who pledge will be kept informed of changes in Rōshi's health and his financial situation and we trust that you will respond as appropriate to Rōshi's needs, your appreciation of our old teacher, and of course, your own financial circumstances.

Is my donation tax-deductible? No. Your donation is not tax deductible. *Friends of Robert Aitken* is an informal group that has coalesced to support Rōshi's needs. This group does not have tax-exempt status and would be ineligible for tax exempt status under US tax laws. Because of this, we appreciate your generosity all the more. Please consult your accountant or tax attorney for further information on the tax implications of making a financial gift in your particular situation. All donations to *Friends of Robert Aitken* are considered gifts to Robert Aitken. Under US tax law, there may be gift tax imposed on gifts made in excess of the current gift tax exclusion amount (currently \$12,000 per year per individual gift). Alternatively, gifts in excess of such amount may be applied against the lifetime unified gift and estate tax credit (currently \$1 million).

Why isn't the Honolulu Diamond Sangha conducting this fundraising effort? The Honolulu Diamond Sangha is an IRC § 501(c)(3) tax exempt religious organization. The tax laws prohibit HDS from collecting funds earmarked for the benefit of a particular individual.

How will donations be used? Donations will be used in two different ways: to help defray current costs for Rōshi's care and to reimburse HDS for costs it has advanced for Rōshi's care since November 2006.

What happens to my donation if all costs are paid? When there are no further current costs for Rōshi's care, and when HDS has been reimbursed for costs advanced for his care since he moved to Pālolo in November of 2006, including fundraising costs, and no further such costs are anticipated, any and all remaining and subsequently received funds will be given to charities selected in advance by Rōshi.

For additional information about this fundraising campaign: Call *Friends of Robert Aitken* at 808.386.4162, or send your questions by email to: info@AitkenRoshi.org, or by regular mail to: P.O. Box 37872, Honolulu, HI 96837.