

DANA FOR AITKEN RŌSHI CAMPAIGN

Questions and Answers (Updated June, 2010)

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.

Have the recent fundraising efforts improved Roshi's financial situation? Yes. Our goal has been to make Roshi's funds last longer. The Friends of Robert Aitken raised \$63,439 in 2009-10, all of which went to pay for Roshi's caregivers, his personal assistant, and minimal fundraising expenses.

How much money is still needed? The Friends of Robert Aitken have pledged to continue the Dana for Robert Aitken project for as long as Roshi is with us. Our original goal was to substantially defray the additional cost for the individual care Roshi now receives at Pālolo (as opposed to the cost of a care home) and to pay the part-time salary of his personal assistant. Roshi would like to have the help of a personal assistant on a full-time basis if our fundraising efforts are successful enough to cover the additional costs. For the level of care Rōshi requires, a good care home in the Honolulu area would cost between \$5 - \$6,000 per month. The current cost of Rōshi's individual care at Pālolo, plus the salary of a full-time assistant, would be about \$12,700 per month.

What is Rōshi's financial situation today? As in October 2007, Rōshi still has significant assets but limited income, and must deplete his assets to cover his living expenses. Since Aitken Roshi moved into the Palolo Zen Center in October 2006 approximately \$387,000 has been expended for his care and assistance. Without continued assistance, and assuming the current rate of expenditure for his care and his medical and living expenses, Rōshi would be out of money in about 2½ 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. Last year's objective hasn't changed: we don't want to wait to see if this happens so we are asking for your continued 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 Rōshi but have read one or more of his 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 and maintain a community of support for Rōshi that allows him to remain at Pālolo and to assuage his concern about running out of money.

Why are annual pledges requested? Your pledge of assistance will help us to assess our ability to support Rōshi in continuing to live at the Pālolo Zen Center as he wishes. Those who give will be kept informed of changes in Rōshi's health and his financial situation. 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 U.S. 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 U.S. 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 to help defray current costs for Rōshi's care.

What happens to my donation if all costs are paid? When there are no further current costs for Rōshi's care, 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: 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.