

INSIGHTS

/// FALL 2022 ///



Oregon Health
& Science University
FOUNDATION

A Hands-On Approach to Changing Lives

Terry Holden's father would build anything, for anyone. An extra bedroom, a shed, a house.

It wasn't because he did it for a living. It was his way of giving back.

"I learned early on from my father that you have a social obligation to help others. It doesn't have to be money, but it has to be from the heart."

— TERRY HOLDEN

The hands-on approach to philanthropy suits Terry and his wife, Cheryl. A scholarship recipient himself — he was awarded a Crown Zellerbach scholarship upon graduating from high school — Terry credits the gift with influencing his decision to attend college and changing the trajectory of his life.

Once the Holdens had the means, they made sure to give back to their community. They began funding scholarships for high school graduates in the Molalla, Oregon, area, and later supported scholarships for Clackamas Community College, just outside Portland, Oregon.

They believed getting to know the students they were helping, staying in each other's lives, and passing along that "pay-it-forward" mentality was important.

When asked about the students they have supported, Terry was enthusiastic about the legacy they were



Cheryl and Terry Holden

creating. "If and when they have the opportunity to help others," he said, "I would encourage them to pay it forward."

In addition to scholarships, the Holdens also support veterans' services, health care and young children. Recently, they became involved with Oregon Health & Science University (OHSU) and the OHSU Foundation and have committed a significant gift in their estate plan to support OHSU Doernbecher Children's Hospital, the Donald D. Trunkey Center for Civilian and Combat Casualty Care and OHSU Casey Eye Institute.

But the Holdens don't intend to miss out on seeing what their generosity can accomplish. They believe life offers too many opportunities to simply sit still and are eager to spend more time partnering with OHSU.

"Over the years, our gifting plan has been fluid. I often get my best ideas by walking, observing and talking," Terry said. "We are in the early stages of working with

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CHERYL HOLDEN



Terry and Cheryl Holden

A Hands-On Approach to Changing Lives

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OHSU, and I see so many opportunities that are going to be rewarding. I’m not expecting to go into surgery — we’re not hands-on like that! But I want to learn about all the other programs, because I know we are going to move in a forward direction with OHSU.”

The Holdens have a big vision for what their philanthropy will do and are excited for the benefits it can bring to others’ lives.

“We all have that obligation to give back to society and help others. Find an activity or venture you really believe in, and you are going to feel very good about it,” Terry said.

Cheryl agreed. “Giving can be very rewarding. What better way to use your money?” she asked. “You can buy things, but you don’t own them — they own you. But when you give from your heart, you can’t measure that. It just feels good.”

If you, like the Holdens, believe in the power of philanthropy to change lives, consider including OHSU and/or Doernbecher in your future plans. **Contact us to learn more. There is no obligation.**



OHSU and Doernbecher Children’s Hospital pair exceptional care, rigorous education and groundbreaking research with a passion for serving others. Our nationally ranked specialties — six in adult, five in pediatrics — are a testament to this passion.

What are you passionate about?



Education



Cancer Research



Children’s Health



Brain Health



Eye and Vision

SHINE A LIGHT ON Your Values

Terry and Cheryl Holden have fully integrated their values into their giving. They know their gift is an investment in exceptional health care across the Pacific Northwest. It is a message to patients, students, educators and researchers that their health, and their work, matters.

Here are some ideas for how you, too, can forge more meaningful connections and pass along your generous spirit.

- **Have you done an activity recently that made you happy?** Consider a cause related to that activity. For example, if you enjoy a particular hiking trail, find a local conservation group to support.
- **If you feel connected to a current event,** see if nonprofits you support are responding and ensure they are set up for success.
- **Go beyond dollars and cents.** Volunteering is a great way to give back, especially for local charities that may not have the administrative staff that their larger counterparts have. Also, inviting friends and family can be an effective way to introduce them to your passions.
- **Your values can unlock others' generosity.** Letting loved ones know what you care about can help you connect. It could even bring them to support the causes you cherish.



Tell your story by keeping a running document
(a generosity journal or ethical will) that gives an account of who you gave to, why you gave to that nonprofit, how it made you feel and how that nonprofit's mission fits into your overall value system.



Discover a Dozen Ways to Make a Difference

In *12 Ways to Uplift Your Community*, you'll find ideas on how to create a meaningful legacy for the important people and charitable organizations in your life. With so many different options, you're sure to find a plan that fits your goals.

Important Dates to Know

Because you might have a lot going on in the final weeks of 2022, we wanted to make you aware of some important deadlines. You can still do so much to change lives this year.

Here are three types of year-end gifts that can benefit both of us:

1. IRA

If you are 70½ or older, give up to \$100,000 per year from your IRA directly to OHSU and/or Doernbecher. You will not pay income taxes on the transfer. If you are required to take minimum distributions, use this transfer to satisfy your obligation.



To do: We must receive your gift by Dec. 31. If you have check-writing features on your IRA, your check must clear your account by Dec. 31 to count toward your required minimum distribution for the calendar year.

2. Appreciated Stock

Avoid paying taxes on the appreciated value and qualify for an income tax charitable deduction based on today's market value when you itemize.



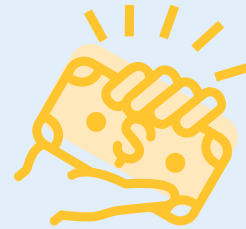
To do: Complete the transfer by Dec. 31.

3. Donor Advised Fund

If you have a fund, contribute to it and enjoy tax savings when you itemize. You can then recommend a grant to OHSU. OHSUF is a qualified charity and gratefully accepts grants from donor advised funds.



To do: Complete the contribution by Dec. 31. You do not have to designate the funds this calendar year to receive the tax benefits.



Looking For Extra Retirement Income?

One smart way to shore up your retirement planning is through the creation of a life income gift. It's a gift that pays you in return and allows you to support what you love at OHSU and/or Doernbecher.

Contact us to learn more about this unique, payment-generating gift. There is no obligation.



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To include OHSU or Doernbecher Children's Hospital in your plans, visit us online: plannedgiving.ohsufoundation.org or email us at giftplanninginfo@ohsu.edu or call us at 503-228-1730.

To make a gift today, visit us online: ohsufoundation.org

Please contact the OHSU Privacy Office at 855-257-4100 or optout@ohsu.edu if you no longer wish to receive fundraising information.