

## A Lifeline for Adult Patients in Need

When serious illness strikes, the costs go beyond medical expenses. There are lost wages. Extra childcare. Food, lodging and transportation. For many patients, the stress of these financial burdens can prevent them from focusing on what matters most: getting better.

Janet and Russ Rotter have seen the need first-hand. When Russ was diagnosed with an aggressive tumor beneath his vocal chords in 2000, the couple traveled from New Jersey to New York City for multiple surgeries and hospital stays. The experience opened their eyes to the number of families who faced financial instability while dealing with a serious health issue.

“We were fortunate, because we had a financial cushion,” Janet said. “But many patients don’t — so we started thinking about ways that we could help support them in their recovery.”

14 years later, the couple had relocated to Portland and were settling into their new home. A postcard from OHSU arrived in the mail. “They were raising money for the Rood Family Pavilion,” Janet explained. “Russ handed me the card and said, ‘What about this?’”

After meeting with the Foundation, the Rotters made a sizeable contribution to help fund the Pavilion’s construction. Today, their name hangs over the entrance to the facility’s adult dining room.

### Meet the Charlie Fund

With the Rood Family Pavilion completed, the couple started looking for other ways to help adult patients. Recalling the assistance they received from hospital social workers during Russ’s recovery, they wanted to donate to a fund supporting

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Janet and Russ Rotter

**“You don’t even realize  
you need social workers  
until you do. Then, you  
suddenly understand how  
indispensable they are.”**

—JANET ROTTER

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OHSU's social services. That's when they learned such a fund didn't exist. In their typical proactive fashion, Janet and Russ decided to start one, and the Charlie Fund was born.

Charlie is a friendly six-year-old girl with a huge heart and a fiercely protective streak. She's also a dog — Janet and Russ's beloved white Swiss Shepherd, to be precise.

"Just as shepherd dogs watch over their flocks of animals, social workers watch over their 'flocks' of patients," explained Russ. "If an adult patient is struggling to afford a basic expense, OHSU social workers can tap into the Charlie Fund to help cover it."

Established in 2019, the fund has been used hundreds of times over.

"I remember there was a breast cancer patient and single mother who was released from the hospital during a big ice storm," said Janet. "She had no way to get home, so the Charlie Fund put her up in a hotel for two nights. Without that sort of intervention, she might have ended up sleeping in the hospital lobby."

In addition to their original commitment, the Rotters make monthly contributions to the endowment's income fund and have thought deeply about the future of their current generosity. To that end, they have created generous gifts in their wills to ensure the Charlie Fund can serve patients for generations to come.

While they're taking a long-term approach, the Rotters say one of the most fulfilling things about the Charlie Fund is its immediate impact.

"So much philanthropy is centered around big-bucks initiatives like an endowed chair or a new building," said Russ. "With the Charlie Fund, the \$100 you give today could have a significant impact in someone's life the very next week."

"To know that you've had a role in helping someone get better — well, I think that's a pretty great feeling," added Janet.

**If you'd like to support the Charlie Fund, please email [Liz Arrington at the OHSU Foundation](#) or call 503-552-0716.**

**OHSU and Doernbecher Children's Hospital pair exceptional care, rigorous education and groundbreaking research with a passion for serving others.**

***What are you passionate about?***



**Education**



**Cancer Research**



**Children's Health**



**Brain Health**



**Eye and Vision**

# Smart Ways to Give

## BEFORE 2023 ENDS

Would you like to finish this year with a gift that maximizes your impact on the lifesaving care and research OHSU and Doernbecher Children's Hospital are known for and reduces your taxes? Consider these smart options below.

### Make an Immediate Difference

When you support OHSU and Doernbecher by simply writing a check, you make great things happen and qualify for an income tax deduction.



**Did you know?** Your envelope must be postmarked on or before Dec. 31 for your donation to qualify this year.

### Use Appreciated Securities

By donating appreciated securities that you have owned for longer than one year, you qualify for an income tax deduction for the current market value and eliminate any tax on the appreciation.



**Did you know?** If the securities are electronically transferred, the gift date is the day the securities enter our account — not the date you ask your broker to make the transfer.

### Contribute to Your Donor Advised Fund (DAF)

Add funds to an existing DAF or open a new one at a community foundation or sponsoring organization.



**Did you know?** You qualify for a tax deduction when you make a gift to your DAF. If you are ready to start making an impact with your DAF, consider recommending a grant (or recurring grants) to support OHSU and Doernbecher.

### Make a Gift From Your IRA

If you are 70½ or older, you can give any amount up to \$100,000 from your IRA directly to OHSU and Doernbecher Children's Hospital. You will not pay income taxes on the transfer. If you are required to take minimum distributions, your gift can satisfy all or part of your obligation.



**Did you know?** If you have check-writing features on your IRA, your check must clear your account by Dec. 31.



## For You

You can support innovative research and kindhearted care in a way that works for your needs. Our new guide, ***Creative Ways to Stretch Your Charitable Dollar***, shows you how. Send back the enclosed reply form for your FREE copy.



Give from your IRA using our free, online tool.  
Scan the QR code to access today.

# 3 Great Ways to Give From Your IRA

An IRA is an appealing way for you to save for retirement. But eventually, the tax bill comes due — when you take your annual distributions...and *again* when you leave your assets to heirs.

To avoid the tax bite and make an impact on bringing compassionate healing and innovative research to the Pacific Northwest, consider a gift to OHSU and Doernbecher.

## 1. Make Your Gift Today

If you're 70½ or older, you can make a tax-free gift (up to \$100,000 in 2023) to OHSU and Doernbecher. Benefits include:

- See the difference you're making today.
- Pay no income taxes on the gift. The transfer doesn't generate taxable income or a tax deduction.

If you are required to take minimum distributions, your gift can satisfy all or part of your obligation.

## 2. Magnify Your Impact After Your Lifetime

You can name OHSU and/or Doernbecher Children's Hospital as a beneficiary of your retirement account. This is a great option for extending support from your IRA beyond your lifetime. It costs you nothing today. Here's how:

1. Contact your IRA administrator for a change-of-beneficiary form or download a form from your provider's website.
2. Name the OHSU Foundation and Doernbecher Children's Hospital and the gift percentage on the form.
3. Let us know about your plans so we can thank you.

### NEW OPTION:

## 3. Create a Gift That Pays You Income

If you are 70½ or older, you can now use your IRA to create a charitable gift annuity. Get fixed, reliable income for life by making a one-time election of up to \$50,000 (without being taxed on the distribution to set up your gift annuity). Because this option comes with special rules, we'd be happy to discuss whether this opportunity is right for you.



Whether you make your impact at OHSU and/or Doernbecher Children's Hospital today or after your lifetime, *your gift matters.*

Please contact us to discuss your plans. There is no obligation.



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& Science University  
**FOUNDATION**

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

To make a gift today, visit us online: [ohsufoundation.org](https://ohsufoundation.org)

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