

INSIGHTS

/// SUMMER 2023 ///



Oregon Health
& Science University
FOUNDATION

Know Before You Go

3 Estate Planning Updates for Summer

This summer, as social plans pick up and travel increases, make sure you are prepared — beyond packing your suitcase and booking hotel rooms!

Your estate plan takes care of practical matters, like directives for medical care, and personal matters, like providing for loved ones and cherished causes. Here are a few essential things to review before summer begins:

1. Make sure your beneficiaries are current

Naming beneficiaries for important assets like your retirement plan accounts or life insurance policies is critical because these pass outside of your will. Without this step, the assets will go to your estate. How these assets are eventually distributed depends on a variety of factors, including where you live, if you have a will and any outstanding debt.

2. Create or update your medical power of attorney or health care proxy

It's important to update these designations so you have someone you trust to make decisions regarding medical care on your behalf.

3. Talk to loved ones

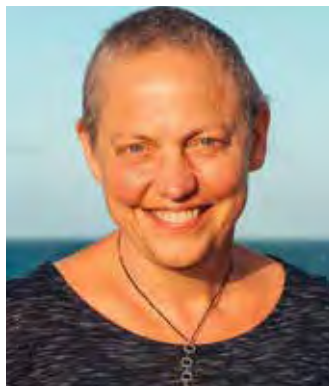
Share your plan with family and show them how your values have informed what you wish to leave behind. If you've included a charitable organization, like OHSU and/or Doernbecher



Children's Hospital, in your plan, let us know so we can ensure your gift is used as you intend.

Your plan is for the people and places you love — make sure yours is updated to provide peace of mind for those who care about you, and a legacy of compassion for places you hold dear.

A Gift Celebrating Adventure, Friendship and Compassion



Abby Crumpacker Vieira (pictured at left) was a world-famous hugger.

With her husband, Robert, and their three children, she sailed the world with Semester at Sea. Students studying aboard the ship cherished Abby. They

called her “The Queen.”

In 2021, Abby passed away from cancer. One year later, family friends Dr. Bob and Margaret Basta made a gift to OHSU in her honor, designated toward the Department of Patient and Family Services program at the Knight Cancer Institute.

Abby and Robert met the Bastas in 2001 on a Semester at Sea voyage. They shared an OHSU bond: Robert was OHSU vice president emeritus, and Bob earned his medical degree from OHSU in 1971.

“Abby was an amazing, engaging and welcoming person. She didn’t care where you were from, what school you went to, or how much money you made. She was just interested in you. She was a strong advocate for the students, and a very special person for everyone on the voyage,” remembers Bob.

Abby and Robert took their last Semester at Sea voyage in 2018, when Abby was being treated at the Knight Cancer Institute by Zahi Mitri, M.D. A plan was formulated to make travel as comfortable as possible.

“Dr. Mitri worked with the physician on board to create a chemotherapy regimen that allowed Abby to sail around the world for three months,” said Robert.

Honoring Abby’s Memory

The Bastas wanted to pay tribute to Abby. They decided to use a qualified charitable distribution from their IRA to make a gift in her name.

They directed their generosity to the Department of Patient and Family Services at the Institute, which provides services that ease the physical and emotional strain of being treated for cancer.

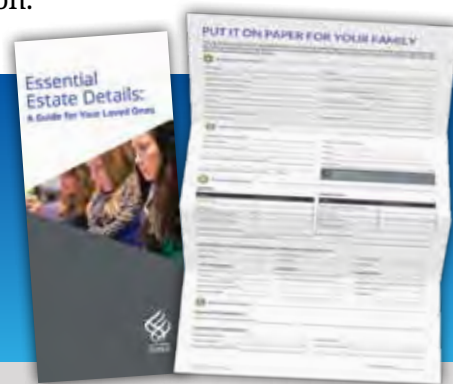
Supporting Families in Need

“I was trained to help people as a physician. But over my career I could also see that the real difficulties were often social — people struggling to afford medications or arrange transportation. Patient and Family Services helps ease that stress,” said Bob.

Abby spent her life treating people with compassion and love. Now, through the Bastas’ gift, her spirit of caring will live on.

Keep Loved Ones in the Loop

Use our helpful resource ***Essential Estate Details: A Guide for Your Loved Ones*** to compile important personal information and serve as a future guide for your loved ones. Send for this FREE organizer tool using the enclosed reply card. today.



**Oregon Health
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To include OHSU or OHSU 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.