

Creating a Legacy of Groundbreaking Research

A Blended Gift to Support Research, Now and Into the Future

A legacy of giving first connected Herb and Jeannie Sundby with Oregon Health & Science University. Jeannie's family members, several of whom suffered from neurodegenerative diseases, established a donor advised fund as part of their estate planning. Through their process of recommending grants from the family donor advised fund, Jeannie and her sister became increasingly familiar with OHSU's world-class physicians and scientists.

However, it wasn't until Herb's prostate cancer diagnosis and subsequent treatment that the Sundbys experienced firsthand the many strengths of OHSU's expertise. They were inspired by what they found.

"Touring the research labs and talking to the people about their fields of study left us both feeling very impressed," Herb says. "OHSU has top-quality people within its walls."

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Herb and Jeannie Sundby



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Wanting to Do More

Following Herb's successful cancer treatment, the Sundbys knew they wanted to do more to support OHSU's work — not just through the donor advised fund, but also with their own contributions. They soon began making qualified charitable distributions through their IRAs to OHSU while continuing to recommend grants through the family donor advised fund.

For the Sundbys, making gifts to advance research aimed at treating and curing neurodegenerative diseases was another way to honor Jeannie's family. "Someday, we'll beat these diseases," Herb says. "If our contributions can help reach that point sooner, we're proud to do it."

After meeting with faculty to deepen their understanding of research at OHSU, the Sundbys were inspired to establish an endowed fund supporting research for Parkinson's and Alzheimer's diseases, the Elkins-Sundby Fund for Alzheimer's and Parkinson's Research. To further support the future of the endowment, they updated their estate plans to include charitable gifts to their fund.

'A Real Future'

"By including OHSU in their estate plans, the Sundbys give our research teams the assurance that there is a real future in their efforts to change lives impacted by neurodegenerative diseases," said Joseph Quinn, M.D., Director, OHSU Parkinson Center and Movement Disorders Program.

Herb and Jeannie agree. "It takes time, money and quality people to do research with the potential to improve people's lives," Herb says. "Having the ability to contribute is a good thing for my wife and me."

The last issue of *Insights* featured a concept known as "blended giving," an approach that allows you to make a bigger impact than you thought possible, by combining current gifts with one for the future. The Sundbys have done exactly that. Their generosity, vision and intelligent estate planning have embraced numerous sources for giving, creating the perfect blended gift. It's a gift that will help conquer neurological disease now and into the future — an impactful continuation of a legacy of giving.

WHAT'S YOUR LEGACY?

A gift in your estate plan is one of the most important philanthropic tools for advancing science and medicine, empowering care providers, researchers and institutions like OHSU to continue their work for generations to come. Contact us to learn how you can begin your own legacy of giving.



3 Unexpected Ways to Make a Difference

These often-overlooked gifts reflect your legacy and create a healthier world.

Life Insurance

As you work toward retirement, your need for life insurance likely declines, making it a great gift option while maintaining assets today. There are two main ways that people use life insurance to support our research, health care and education efforts:

- You can name OHSU and/or Doernbecher as the beneficiary (or co-beneficiary) of an existing life insurance policy. After your lifetime, the proceeds will improve human health.
- You can make OHSU and/or Doernbecher owner of the policy, resulting in more tax savings for you.

Bank and Brokerage Accounts*

Like retirement plan assets and life insurance policies, you can designate a beneficiary of bank or brokerage accounts in one of two ways:

- **Payable on death (POD):** You name one or more persons or charities as the beneficiary of your checking or savings accounts or CDs once you—the account owner—pass away.
- **Transfer on death (TOD):** You designate one or more persons or charities to receive

proceeds from your brokerage or investment accounts after your lifetime.

Remember, you can designate a certain percentage of the account rather than transferring all of the account solely to us. The beneficiary also has no rights to the funds until after your lifetime, allowing you to use the money in the account freely, change the beneficiary or close the account.

Stocks

If you own stock that has increased in value since you purchased it (and you've owned it for at least one year), donating it to us can score you major tax savings. You will receive an income tax deduction (if you itemize) and also eliminate capital gains taxes on the transfer.

We're happy to help you find the right gift option to meet your charitable goals and support community health and well-being. Contact us to start the conversation.

*State laws govern payable-on-death accounts and transfer-on-death accounts. Please consult with your bank representative or investment advisor if you are considering these gifts.



How Your Estate Plan Helps Others Plan

Talking about estate planning may be uncomfortable, but it's critically important. Your estate plan serves as a testament to who you are, your values and your legacy.

Communicating your plan clearly and honestly with your loved ones gives you and them peace of mind. By making your future plans known, you're not only ensuring your wishes are carried out, you're helping your loved ones plan for their futures as well.

If you've included a gift to OHSU and/or Doernbecher in your estate plan, please let us

know. Like with your loved ones, it helps us plan — so we can focus on healing, teaching and discovery well into the future.

More than half of people who leave charitable gifts in their wills do not notify the organization, leaving the charity at risk for not receiving the gift they intended. When you tell OHSU and Doernbecher about your gift, you also join a committed group of supporters in our legacy societies, the Sam Jackson Guild and the Frank Doernbecher Guild.

Get your FREE GUIDE!

Our FREE resource *Your Family's Guide to Your Estate* can help you go into these conversations prepared. Use it to compile important information and help your loved ones locate documents in the future. To request your copy, simply fill out and return the enclosed survey today.



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To include OHSU or Doernbecher Children's Hospital in your plans, visit us online: plannedgiving.ohsufoundation.org.

To make a gift today, visit: onwardohsu.org.

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