

INSIGHTS

/// SPRING 2021 ///



Oregon Health
& Science University
FOUNDATION

Donors Give \$2 Billion to Benefit the Health and Well-Being of Oregonians

Seven years ago, OHSU was inspired by Phil and Penny Knight's historic call to action, and donors rushed to show their support. By June 2015, more than 10,000 donors like you met the Knight Cancer Challenge to raise \$1 billion for cancer research and care.

But the journey didn't end there. We thought bigger and continued onward. We set an ambitious goal: Raise an additional \$1 billion, across all of OHSU's missions, by Dec. 31, 2020. This was the ONWARD campaign.

Thanks to you, we have met that goal, and your support has expanded the frontiers of human health. You have brought unprecedented generosity and hope.

"Human health, equitable access to health care, education and medical research have never been more important to our communities than they are right now," says OHSU President Danny Jacobs, MD, MPH, FACS. "We are incredibly grateful to everyone across the state and country who stepped up to invest in OHSU's future. Every dollar will help strengthen our ability to positively impact the health and well-being of those we serve."

Your Generosity in Action

Thanks to more than 50,000 donors like you, lives have been changed for the better. A family from rural Oregon has a place to stay while their child receives specialized cancer treatment, thanks to donors who contributed

to the Gary & Christine Rood Family Pavilion.

OHSU's neuroscience experts can make new discoveries and pursue promising therapies, fueled by gifts from donors whose lives have been touched by Alzheimer's disease, multiple sclerosis, Parkinson's disease, traumatic brain injury and ADHD.

Families who have experienced cancer can find hope knowing OHSU's cancer researchers are collaborating better than ever before in pursuit of immunotherapies, personalized cancer treatment and early detection. The OHSU Knight Cancer Research Building creates new capacity for nearly

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How to Be Generous at Every Age

Generosity takes on new meaning as we grow older, build financial resources and set charitable goals. These planning checkpoints, arranged by age group, outline how to maximize your generosity to the causes that matter the most to you.

50s

Update your will to reflect any life changes, such as beginning a new relationship or grown children leaving home. Meet with a financial advisor to review your investments and savings — there's still time to make catch-up contributions for retirement.

Best Ways to Be Generous

- **A gift in your will or trust:** This costs you nothing today and can be made by adding one sentence to this document.
- **Retirement plan assets:** Name OHSU Foundation and/or Doernbecher Children's Hospital as a beneficiary of part or all of your retirement plan assets. It takes minutes to contact your plan administrator or complete the change-of-beneficiary form online.
- **Appreciated securities:** Donate stocks you've owned for longer than one year and receive an income tax charitable deduction when you itemize. You can also eliminate capital gains taxes.

60s

Check with your financial advisor to make sure you are on track with retirement savings. If you've already retired, revisit your expenses, priorities and health care needs.

Best Ways to Be Generous

- **Life income gifts:** If you are looking for income in retirement, consider establishing a charitable remainder trust and use appreciated assets to maximize your tax benefits. You receive income for life from the trust, with the rest supporting OHSU and/or Doernbecher Children's Hospital after your lifetime. If you have a high net worth and are looking to minimize taxes, a charitable lead trust allows you to support OHSU and/or Doernbecher now and provide for loved ones in the future.
- **Beneficiary designations:** Review the beneficiaries of your life insurance policies and retirement plan assets. Many of these assets may result in a large tax hit for your family, but they pass tax-free to us.
- **Bank or brokerage accounts:** Most states* allow you to designate one or more individuals or charities as a beneficiary of a checking or savings account; certificates of deposit; or brokerage or investment accounts.

* 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.



WHAT'S RIGHT FOR YOUR STAGE?

We're ready to work with you and your professional advisor to discuss a variety of giving options that work best for your personal circumstances. Please contact us to get started.

70+

Discuss your giving goals with your family and meet with your financial advisor to align your financial and philanthropic plans.

Best Ways to Be Generous

- **Gift from your IRA:** If you are 70½ or older, give any amount up to \$100,000 per year from your IRA directly to a qualified nonprofit such as OHSU Foundation and/or Doernbecher's Children's Hospital without having to pay income taxes on the money.
- **Legacy letter:** This optional companion piece to your estate plan is a chance to share your dreams and your story with your loved ones.

BACK IN 2021

After being suspended in 2020 as part of the CARES Act, the required minimum distribution (RMD) is back in 2021 for those 72 and older. If you don't need your distribution for daily expenses, consider using it to make a tax-free gift to OHSU Foundation and/or Doernbecher's Children's Hospital. Contact us to learn more.



Ready to Start Saving for the Future?

A financial advisor can help! Our FREE brochure *Your Guide to Working With a Financial Advisor* will walk you through everything from choosing an advisor to what to expect in your first meeting. Request your copy using the enclosed survey.

ONWARD CAMPAIGN

BY THE NUMBERS



**MORE THAN
50,000** donors

contributed to changing
lives for the better.

Thank you!



NEARLY 80% of
campaign gifts came from
donors in Oregon and
southwest Washington.



The OHSU endowment
grew by **115%**
throughout the campaign.

WHICH LED TO...

*Establishing 213
new endowed funds,
including 11 new
endowed chairs and
34 new endowed
professorships.*

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Continued from front

700 scientists and staff members
as new recruits join the Knight
Cancer Institute.

Patients struggling to retain
their eyesight can turn to the
Oregon Elks Children's Eye
Clinic at the Casey Eye Institute.
The new clinic expanded the
original pediatric clinic's space
by nearly one-third. The facility
also provides state-of-the-art
eye care for issues ranging
from macular degeneration to
inherited conditions that can
cause blindness.

When a child's life is turned upside
down by a devastating illness
or injury, OHSU Doernbecher
Children's Hospital is there with
patient-centered care and access
to new therapies not available
anywhere else in the community.
The hospital has developed
innovative programs such as
NICH, or Novel Interventions
in Child Healthcare, to improve
outcomes for children, and their
families, whose medical needs are
compounded by social, personal or
financial challenges.

A Groundswell of Giving

"This is a testament to the
generosity of our philanthropic
supporters joining together to
make a difference across our
state," says Matt McNair, OHSU
Foundation president.

Nearly 80% of campaign gifts
came from donors in Oregon
and southwest Washington, and
more than half of those who
contributed to ONWARD are
first-time OHSU donors.

Moreover, the OHSU endowment
grew by 115% throughout the
campaign. This allowed the
university to establish 213 new
endowed funds, including 11
new endowed chairs and 34
new endowed professorships,
helping to recruit and retain the
best and brightest.

"Gifts of every size were necessary
to achieve this ambitious goal,"
says McNair. ***Each and
every contribution helps
to improve the health of
our communities.***



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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.