

# Giving Forward



Building Community Together

A Publication of the Blue Heron Foundation At Willamette View

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## BLUE HERON FOUNDATION AT WILLAMETTE VIEW UNVEILED

In a standing room only event on November 11th, CEO Craig Van Valkenburg unveiled the Blue Heron Foundation At Willamette View... and its vision, "Building Community Together." Three words that says it all.

BLUE HERON  
FOUNDATION  
At Willamette View



Building Community Together

### What makes this foundation different...

The Blue Heron Foundation is transparent and fully invested in the Willamette View community, with the capacity and drive to raise funds for current and future projects as well as support programs which strengthen and benefit all aspects of campus life; in addition to providing financial assistance to residents in need.

The Blue Heron Foundation also offers residents, families, friends and employees a variety of fund and endowment options as a means to give back to Willamette View – in a way that meets their individual values as well as see their gifts at work... here and now, during their lifetime. *(See related story with the list of community funds on the back side.)*

## Meet the WV Development Committee's Ron Nordeen and Ernie ZumBrunnen

Overseeing the philanthropic and fundraising activities of the Blue Heron Foundation At Willamette View is the Development Committee, an official committee of the Willamette View, Inc. Board of Directors. Two members since the committee's beginning in December 2014 are Willamette View residents Ron Nordeen and Ernie ZumBrunnen.



*Ron Nordeen and Ernie ZumBrunnen on the right.*

**Ron Nordeen** spent 40-plus years as a development professional, working with hospitals and universities up and down the West Coast; his last position was at Clackamas Community College. During his career Ron specialized in deferred and annual giving programs as well as capital campaigns. Following the death of his wife of 30 years, Ron reunited with a college classmate, Ginna Jones; they are now celebrating 25 years together. When asked why philanthropy is important to Willamette View, Ron replied, "It enhances the art of living well; gives people the chance to become a part of what makes this a wonderful place."

**Ernie ZumBrunnen** is a retired CPA. He spent his career in the San Francisco Bay Area – San Francisco, Oakland and San Jose – working in financial services, serving a wide range of clients with an emphasis on technology companies. Ernie also actively volunteered in the community, including chairing a successful Parks & Playgrounds bond drive for the City of San Jose. Ernie is married to Grace Hawes. They have lived at Willamette View since April 2006. Ernie hopes that philanthropy at Willamette View will "continue as it always has... with people eager to share their good fortune."

Although Ron and Ernie come from different backgrounds, it's their shared commitment that make them each strong, valuable contributors on the Willamette View Development Committee.



## Donate your Required Minimum Distribution tax-free directly to a charity of your choice

This year, when you make a gift **directly** from your IRA you take advantage of the “IRA Charitable Rollover” passed into law by Congress late in 2015. The donation counts as your required minimum distribution or RMD, but doesn’t increase your adjusted gross income.

To make a directed gift from your IRA to Willamette View, Inc., contact the custodian of your IRA and give them the following information:

**Willamette View, Inc. — Attention: Blue Heron Foundation**  
**12705 SE River Road, Suite 320B Portland, OR 97222**  
**Tax ID# 93-463816**



### Time to check your end-of year list

Make Blue Heron Foundation At Willamette View *your charity of choice.*

As we approach the end of 2016, we would like you to consider including one or more of our funds in your year-end giving. These fund options allow you to donate where it means the most to you.

- **Alan Fibish Employee Scholarship Endowment:** created by residents in memory of a friend and dedicated teacher. Your donation means that an employee can further their education and training.
- **Capital Fund:** your donation will focus on making improvements to the community by supporting the libraries, Harmony Garden, Riverview Project, and the replacement of equipment and buildings.
- **Good Neighbor Fund** (formerly called the Benevolent Fund): creates financial security for your neighbors and future residents who live beyond their financial resources. Donations to this fund also support Willamette View’s healthcare programs, such as “Music and Memory.”
- **Heron Fund:** unrestricted funds used to fund the areas of greatest need within our community.

*Willamette View, Inc. is an Oregon 501(c)3 not-for-profit organization; your contributions are tax deductible.*

For information on the Blue Heron Foundation At Willamette View, contact:

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**BLUE HERON**  
FOUNDATION  
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The Development & Donor Relations Office is now the Blue Heron Foundation At Willamette View

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