Gift of Retirement Funds Leads to Family’s Tribute

On March 14, 2015, Julie B. Poduch passed away following complications after a long battle with cancer—first breast cancer in 1999, then head and neck cancer nearly a decade later. In honor of the care she received at OHSU, she designated that 50% of her Vanguard retirement funds be directed to the OHSU Foundation in support of the OHSU Knight Cancer Institute.

In addition to being a very accomplished senior marketing executive, Julie was an avid volunteer for many organizations. She once stated she always focused on the greater good and making a positive difference in any setting. This motto carried through her cancer treatment, beginning in 1999 when she participated in an early breast cancer clinical trial that ultimately led to a new standard of care and treatment option for women with breast cancer. She touched the lives of countless people through her volunteer work, community advocacy, participation in cancer clinical trials and now this legacy gift through her estate.

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Imagine a world without AIDS. Without cancer. Without blindness. At Oregon Health & Science University, we’re more than imagining that world. We’re creating it.

OHSU has a long tradition of taking on the impossible—and delivering. We invented and implanted the world’s first successful artificial heart valve. We performed the world’s first angioplasty. We developed the first targeted cancer therapy.

What makes us so different? We know how to collaborate—with each other, with private industry, with other institutions. Oregon’s pioneer spirit still calls people of vision to come here and do their best work. At OHSU, we’ve repeatedly shown that the road less taken is—more often than not—the fastest way to a better world.

New and even more formidable challenges await us on the next leg of our journey to transform health. Philanthropic support and partnerships will determine how far we go and how fast we get there.

In mid-October, we launched “Onward OHSU,” the second phase of a seven-year comprehensive fundraising campaign to support key initiatives at the university. (See back cover for specific goals.)

Achieving these ambitious goals will require investment in exceptional people and programs to drive rapid change in research, education and health care. Through the Onward OHSU campaign, we will form philanthropic partnerships generating more than $2 billion for OHSU priorities by the end of 2020.

We’re already more than halfway to our goal, thanks to the record-breaking success of the recently completed Knight Cancer Challenge. By successfully exceeding the philanthropic goals of this unprecedented cancer fundraising initiative, OHSU achieved what many considered to be impossible. We raised more money for cancer research ($1 billion) in less time (22 months) than had ever been raised.
before. The momentum and national exposure created when Phil and Penny Knight publicly challenged OHSU to match their $500 million pledge helped us secure gifts from more than 10,000 supporters from all 50 states and more than a dozen other countries.

Though the Knight Cancer Challenge was indeed a remarkable achievement, OHSU is hardly new to the business of exceeding expectations. We invest in people with big ideas, and we embrace the risks that go along with it—because that’s what it takes to advance knowledge and transform lives.

Philanthropy is a critical factor in our ability to recruit and equip distinguished clinicians and scientists, conduct more hope-giving clinical trials, offer breakthrough treatments to more patients, and invest in the education and early career stages of tomorrow’s health and science leaders.

Over the next five years, we’ll continue to share stories of how OHSU is making an impact.

To learn more about the power of giving and how it continues to propel OHSU forward, please visit OnwardOHSU.org.

“Julie was always very generous with her time and contagious energy in supporting organizations close to her heart and that she shared a personal connection with. She was so grateful for the care she received at OHSU and it was important to her to acknowledge that by helping others benefit from their compassionate care as well. Her courage and grace were an inspiration to many, and this final donation is a fitting tribute to the ideals Julie fervently believed in. I hope it inspires others to contribute!” —Laura Parcells, Sister

MacKenzie Hall was the first building to open on the Marquam Hill Campus in 1919. Today OHSU continues to move forward with the Onward OHSU Campaign.

Tribute Gift
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Working closely with the OHSU Foundation, Julie’s family expressed their wishes to honor the memory and values of their late daughter and sister while recognizing the outstanding care Julie received, particularly from Dr. Peter Anderson, by directing the majority of Julie’s gift to create a fund to support cancer research and supportive services that benefit cancer patients. In her family’s eyes, such a fund would reflect Julie’s values. As she would say, “If I can help someone, I want to do it.”

If you or someone in your family would like to learn how to give to OHSU or Doernbecher through a beneficiary designation—or to honor a family member through a gift in your will or trust—we can help. Please contact Erica Armstrong (503 220.8318), Ann Barden (503 412-6355), Mike Macnab (503 552-0702) or Pete Sommerfeld (503 220-8328).
Join Us!

Have you joined us? Since July 2012, we’ve welcomed 255 new members to the Sam Jackson Guild and Frank Doernbecher Guild! Support the future of OHSU and Doernbecher by making a gift in your will or trust or by including us as a beneficiary of your retirement account, insurance policy or investment account.

And if you have already included OHSU or Doernbecher in your estate plans, please let us know. Contact one of our gift planners listed on the back cover, or visit us online at giftplanning.ohsufoundation.org or giftplanning.dchfoundation.org. Thank you!

“Julie was always very generous with her time and contagious energy in support of organizations close to her heart and that she shared a personal connection with. She was so grateful for the care she received at OHSU and wanted to acknowledge that by helping others benefit from compassionate care as well. Her courage and grace were an inspiration to many, and this final donation is a fitting tribute to the ideals Julie fervently supported. I hope it inspires others to contribute!”

—Laura Parcells, Sister
The purpose of this publication is to provide general gift, estate, and financial planning information. It is not intended as legal, accounting, or other professional advice. For assistance in planning charitable gifts with tax and other financial implications, the services of appropriate advisors should be obtained. Consult an attorney for advice if your plans require revision of a will or other legal document. Tax deductions vary based on applicable federal discount rates, which can change on a monthly basis. Some opportunities may not be available in all states. ©MMXV RFSCO, Inc. All Rights Reserved.
Please send me/us a copy of your complimentary booklet “Giving Through Retirement Plans” without obligation.

□ I/we have included OHSU Foundation or Doernbecher Children’s Hospital Foundation in my/our estate plans.

□ I/we would consider including OHSU Foundation or Doernbecher Children’s Hospital Foundation in my/our estate plans.

Name ____________________________________________

Spouse’s Name _____________________________________

Address ___________________________________________

City ______________________________________________

State ________________________ ZIP

Phone (optional) ____________________________________

E-mail (optional) ____________________________________

(Please fold and tape closed before mailing.)
Do you wish it were possible to do more for OHSU? Many of our supporters, like Julie Poduch on the cover, found that they can make a difference at OHSU through gifts of retirement plan assets.

Why are retirement accounts such as IRAs, 401(k)s and other retirement savings vehicles such a good way to give?

If you leave assets in retirement plans to an individual, the funds will be included in that person’s taxable income in the year the person withdraws them, as well as possibly estate tax, reducing the value of your bequest to that heir. On the other hand, if you leave other assets to those same heirs, only estate tax might be due (although today very few estates are subject to estate tax). Therefore, it may be far more advantageous to leave heirs assets that would not cause them to owe additional income tax and leave the retirement assets to OHSU, which is tax exempt.

If you do decide to leave retirement assets to heirs, you might want to consider leaving OHSU whatever may be left over in the account after loved ones have been provided for. By doing so, you can ensure your heirs’ security while also making a special gift to OHSU.

For more information about how to enhance your own and your loved ones’ futures, and the future of OHSU, please contact a member of our gift planning team: Erica Armstrong (503 220-8318), Ann Barden (503 412-6355), Mike Macnab (503 552-0702) or Pete Sommerfeld (503 220-8328).
In mid-October, we launched “Onward OHSU,” the second phase of a seven-year comprehensive fundraising campaign to support key initiatives at the university, including:

- Radically improving early cancer detection
- Developing a vaccine to prevent and cure HIV infections
- Ending the most common forms of preventable blindness in children and adults
- Building a guest house for families of children requiring complex care at Doernbecher Children’s Hospital and cancer patients traveling to the OHSU Knight Cancer Institute to participate in clinical trials
- Enhancing prevention, earlier detection and treatment of cardiovascular disease
- Finding new solutions to a range of debilitating brain disorders, from autism to Alzheimer’s disease

See the full story inside.

For More Information...

To include OHSU or Doernbecher Children’s Hospital in your plans, complete the attached card or visit us online: giftplanning.ohsufoundation.org or giftplanning.dchfoundation.org

We are here for you!

We are available to help you and your advisors with the charitable aspects of your plans.

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