Sample Bequest Language
“I hereby give, devise, and bequeath _________
(a specific dollar amount or percentage of the
residue of my estate) to the Oregon Health &
Science University Foundation, a non-profit
corporation of the State of Oregon, to be used to
further the purposes of Oregon Health & Science
University in the area of greatest need.”

If you wish to direct your gift to a specific area, we
would be happy to help you with appropriate language.

On Christmas Eve 1924, the family of Charles
Samuel “Sam” Jackson donated 88 acres on
Marquam Hill to be used “for the benefit of
the Medical School and affiliated institutions.”
The Jackson legacy helped create today’s
Oregon Health & Science University – where
healing, teaching, discovery and outreach
come together to serve the people of the
Northwest and beyond.

The Sam Jackson Guild was created to
specifically honor individuals who have
established bequests and other deferred gifts
benefiting OHSU. Sam Jackson represents just
one of many individuals, couples and families
who have made transformational gifts through
provisions in their estate plans. Each member
of the Sam Jackson Guild plays a critical role
in shaping the OHSU of tomorrow.
Sam Jackson was one of the founding donors whose vision and contributions helped establish Oregon Health & Science University. Today, many donors stand with this pioneer as members of the Sam Jackson Guild by establishing a bequest or other deferred gift to benefit the life-changing, life-saving work of our institution.

We invite you to join in this effort by including OHSU in your estate plans or making a deferred gift. Gifts of any size can make a meaningful impact on one or more of OHSU’s areas of excellence. And when these gifts are combined with others, they help reach even greater goals and build momentum for OHSU’s future successes.

In short, the deferred gifts of visionary donors make a profound and lasting impact. We invite you to join these visionaries. Whether you choose to make an unrestricted gift or direct it to a specific school, department, program, research area, or endowment, your gift to OHSU qualifies you for membership in the Sam Jackson Guild.

Let us know your plans
To recognize your generosity and inspire philanthropy in others, deferred gift donors are honored in the following ways:
- Presentation of a membership certificate
- Guild membership listing in Foundation materials
- Invitations to donor recognition and other special events

We would appreciate knowing of your intentions to support OHSU’s future. If you have included the OHSU Foundation in your plans, please let us know by completing our notification form. If you wish to remain anonymous, please indicate your preference on the form.

Office of Gift Planning
OHSU Foundation
503 228-1730 / 800 462-6608
giftplanning.ohsufoundation.org

There are many ways to join us

Bequests
Gifts through your will or revocable living trust may be for a specific dollar amount, a percentage of your total estate or a residual amount remaining after all other specific bequests have been made.

Beneficiary Designations
Naming the OHSU Foundation as beneficiary of your retirement plan, IRA account, life insurance policy, annuity, bank account or brokerage account is a popular and simple way to make an end-of-life gift.

Life Income Gifts
A life income gift enables you to make a charitable contribution and also receive an income for life or term of years, an income tax deduction and the potential to reduce possible estate taxes. The most common life income gifts are charitable gift annuities and charitable remainder trusts.

Real Estate
If you wish to make a deferred gift with real estate, there are several gift plans available to maximize your financial and charitable goals.

These are some of the ways you can give. Our gift planners are available to assist you and your legal and financial advisors in exploring the possibilities.

An administrative fee may be applied to gifts.