



## Funding Priorities

### Endowment Investment Growth

Sustainable income can be achieved through growth of the Endowment Fund. Spending policy allows 5% of value to be distributed annually. No earnings have been allocated to date. Endowed funds must reach a value of \$500,000 before any distributions of earnings are made. Annual distributions will support Funding Priorities. Funds in perpetuity will work to fill the needs of Oregon Schools for years to come.

### Classroom Grant Program

Since 2000, over \$114,000 has been invested back into Oregon classrooms providing innovative and enriching opportunities in the form of classroom grants.

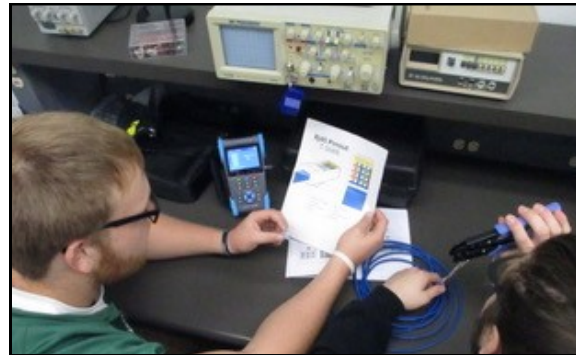
### Elementary Art Club supplies

Budget cuts eliminated Art instruction for K-4, resulting in the creation of after-school elementary Art Clubs. OSF contributes the supplies.

### Academics, Arts & Athletics

Targeted Funding has helped provide improvements to specific needs under Academics, Arts and Athletics in all six district schools. OCS Leadership team determines the area of greatest need.

*"Alone we can do so little,  
together we can do so much."  
-Helen Keller*



## PLANNED GIVING

Please be advised that Oregon Schools Foundation (OSF) is not a tax or legal advisor. If you intend to make a planned gift to OSF, please seek the advice of a tax or legal advisor before making any decisions. Oregon Schools Foundation is a 501c3 organization with the IRS.

If you have chosen to include OSF in your Will or other estate plan, we should be named as:

**Oregon Schools Foundation**, organized and existing under the laws of Ohio

EIN: 34-1691643

Business Address:  
**5721 Seaman Road  
Oregon, Ohio 43616**

Phone: 419.693-0661  
Email: [OregonSchoolsFoundation@gmail.com](mailto:OregonSchoolsFoundation@gmail.com)  
Website: [www.OregonSchoolsFoundation.org](http://www.OregonSchoolsFoundation.org)



*Mission: Provide resources that expand and enhance educational opportunities that inspire learning, enrich teaching and create opportunities for district students through community support.*



## PLANNED GIVING

## What is the FOUNDATION?



*The Oregon Schools Foundation (OSF) was created in 1991 by a partnership of parents, community members and local business leaders to establish an alternative funding source for the Oregon City Schools district.*

*OSF is a nonprofit organization that works to raise private dollars for our public school district. An independent board of volunteers lend their leadership, organizational and networking skills to serve this organization.*

*An endowment fund was established to provide additional income in perpetuity to meet district needs. Without touching principal investments, the fund can grow and only earnings can be distributed. Distribution of earnings will not begin until the fund reaches \$500,000. Program and project offerings have expanded to meet the needs of the district today as described under Funding Priorities.*

*Leaving a legacy happens on many levels. From the relationships you have shared with your spouse, children, grandchildren and friends to the mark you leave on the world with your financial decisions. Considering Oregon Schools Foundation when planning your estate provides an opportunity for your financial gift to live well beyond a one-time donation.*

*A gift to OSF today, can provide many generations of future Oregon students a sound education. Consider including a bequest provision in your Will or Trust.*

## PLANNED GIVING

### How It Works



*Planned giving is the process of donating planned gifts. A planned gift is a contribution that is arranged in the present and allocated at a future date. You can provide a future gift to OSF by including a bequest provision in your Will or Trust.*

*Commonly donated through a Will or Trust, planned gifts are most often granted once the donor has passed away.*

#### Planned gifts take a number of forms.

- Bequests from a Will or Trust
  - Stock or Securities
  - Life Insurance
- Tangible Personal Property
  - Real Estate
- Retirement Plan - Estate Distributions
  - Donor Advised Funds

*There are tax and financial benefits to your planned gift. You can designate your bequest to a specific purpose within OSF. There are many gift options available. You may choose the best scenario that works for you, your family and your charitable wishes.*

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5721 Seaman Road  
Oregon, Ohio 43616  
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OregonSchoolsFoundation@gmail.com  
www.OregonSchoolsFoundation.org

## The Oregon Schools FOUNDATION

### PLANNED GIVING Provisions

#### Bequest (Sample Language)

- **Unrestricted Gifts:** A gift that can be used where need is greatest.

*I give, devise, and bequeath to Oregon Schools Foundation, Oregon, Ohio, the sum of \$ \_\_\_\_\_ \*, for its general purposes.*

- **Gift for a Specific Purpose:** A gift that can be used for a specific purpose.

*I give, devise, and bequeath to Oregon Schools Foundation, Oregon, Ohio, the sum of \$ \_\_\_\_\_ \*, for (state specific purpose, program or activity).*

- **Residuary Bequest:** Leaves any remainder after all other bequests have been made.

*I give, devise, and bequeath to Oregon Schools Foundation, Oregon, Ohio, \_\_\_\_\_% of the residue of my estate to be used for its general purposes.*

- **Contingency Gift:** Takes effect only if a primary intention cannot be met.

*In the event \_\_\_\_\_ predeceases me, I give, devise, and bequeath his/her share of my estate to Oregon Schools Foundation, Oregon, Ohio, to be used for its general purposes.*

*\*Rather than leaving a sum certain, you may include language that refers to a percentage of your estate or a description of the property you wish to give.*