

Support HEF's Endowment through a direct gift or your own OCF Fund.

OCF can help you chose which type of fund is right for you.

DONOR ADVISED FUND (\$25,000+)
Be an active participant. Recommend grants from your fund to nonprofit organizations you choose, including HEF.

SCHOLARSHIP FUND (\$50,000+)
Help increase access to higher education. Support the type of student you care about by setting purpose, selection and award criteria. Your fund can support graduating high school seniors from Hermiston High School.

DESIGNATED FUND (\$50,000+)
Provide annual direct support to one or more specific charitable organizations, including HEF.

COMMUNITY FUND (\$50,000+)
Share your passion with OCF, and staff will direct grants to outstanding nonprofits supporting your interests, including, for example, education in Umatilla County.

You can also make a gift directly to Hermiston Education Foundation and direct that it be added to its endowment fund at OCF.

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Hermiston Education Foundation

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Hermiston Education Foundation Endowment

Committed to excellence and preparing our students for the 21st century.



A proud partner of
Oregon Community Foundation

HEF: An OCF Partner

The Hermiston Education Foundation is a proud partner with the Oregon Community Foundation. HEF's permanent endowment fund is managed by OCF to provide the Foundation with a steady income stream to offset operations, fund new and innovative programs and support other mission-critical activities. OCF's investment program combines the assets of permanent charitable funds for investment, meaning each fund benefits from the strength of a large, pooled portfolio. The result is high quality, diversified investment management at a reasonable cost.

As one of the largest community foundations in the nation, Oregon Community Foundation offers stability, expertise, and a proven commitment to donors and to Oregon's communities.

HEF's mission is to empower students to explore all academic areas as well as the arts. It is committed to providing students with the tools and knowledge necessary to build new ideas and excitement for learning.

Deferred and Life Income Gifts

OCF can work with donors and their professional advisors to establish bequests, charitable gift annuities, and charitable remainder trusts. Donors may choose to name HEF's endowment or their own OCF fund in their estate plan or enjoy an income stream for life, or a certain term of years, while receiving an income or estate tax benefit through a trust or annuity. Because deferred gift planning can be complex and there are variations within each gift type, HEF recommends, and can arrange, for you to plan your gift in consultation with your financial and legal advisors and OCF.

Bequests and Beneficiary Designations

Through your will or living trust, you can create your own fund or make a gift to support the HEF endowment with either a set dollar amount or a percentage of the residual. You can designate HEF's Endowment or another OCF fund as a charitable beneficiary of your retirement plan assets or life insurance policies.

Charitable Gift Annuities

In exchange for your donation of cash or securities, a charitable gift annuity pays you or another annuitant a fixed annual amount for life. After the death of the annuitant, the remaining assets can be used to support the HEF endowment or create or add to your existing OCF fund. The minimum contribution is \$25,000 and the donor must be at least 60 years of age.

Charitable Remainder Trusts

You can make an irrevocable transfer of an asset such as real estate or securities to create a charitable trust. The trust provides a

specified distribution percentage to one or more beneficiaries, for either their lifetimes or a term of years. After the trust ends, the remainder can be used to support HEF's endowment or create or add to your existing OCF Fund. The minimum gift amount is \$100,000 and the donor must be at least 55 years of age.

If you would like to learn more about supporting the HEF endowment through your estate or creating a life income gift, please contact your local OCF office in Bend, Oregon or the Hermiston Education Foundation.

The mission of the Oregon Community Foundation is to improve life in Oregon and to promote effective philanthropy. OCF works with individuals, families, businesses and organizations to create charitable legacy funds to support community causes they care about. OCF's wise management of its investments optimizes the purchasing power of these funds, which allows for a distribution of more than \$80 million in grants and scholarships every year.

OCF's Endowment Partner Program provides ongoing stewardship of endowments of nonprofit organizations. The organization also receives support in helping its donors create deferred or life income gifts to support the endowment.

www.oregoncf.org

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