



Gratitude and Giving

Tis the season for gratitude and giving. In this newsletter, we will look back with gratitude to the success of the Summer Solstice: Kentucky Derby event where guests celebrated this time-honored tradition by wearing their finest hats and enjoying a southern-style luncheon. You will meet our newest Foundation board members including two external directors and an internal director. We will also highlight two new members of the Plaza's Executive Team.

As we learn more about the newest members of the Foundation's leadership, it is time to reflect on the passing of Foundation founder and friend to the Foundation Charles "Chuck" Lutton who died on October 23, 2016 having lived at the Plaza for nearly 30 years. He was a part of the vision team that saw the value of building the Plaza's capacity through philanthropic support. He also was instrumental in bringing clarity to the finances of both the Plaza and Foundation setting the course for the strong financial position both organizations experience today.

In the months to come, you will learn more about the Foundation's history and plans for the year to come. As always, I offer collective thanks on behalf of the Foundation Board of Directors for your generous, loyal support of our work.

Brenda Ray Scott, CFRE
Foundation Executive Director

25 Years and On: The Celebration Continues

The Terwilliger Plaza Foundation is in the midst of celebrating its 25th anniversary as a 501(c)(3). In early 1991, several individuals came to together as an organizing committee to discuss the concept. Eventually this recommendation was made to create the Foundation. July 26, 2016 marked the organization's anniversary of that initial recommendation. The Foundation received its 501(c)(3) status on January 22, 1992.

In the recommendation, the committee proposed establishing the Foundation, "To develop appealing programs to encourage TP members and others, to support the TP Foundation through gifts and bequests. The programs should promote various methods of giving, restricted and unrestricted (inclusive of beneficial tax advantages



Donor Wall (2014) Masthead

to givers), i.e., cash, stocks, bonds, and other marketable securities, real and personal property, life insurance, annuities, memorials, etc." The recommendation goes on to talk about enhancements. During the intervening 25 years, the Foundation has worked with the Plaza to have an impact. In a future newsletter, you will read about those enhancements and how a Member named Jane Winks Kilkenny chose to make a transformative gift making significant enhancements possible. Thank you for helping the Foundation grow to have an impact on the community.

2017 EVENTS SAVE-THE-DATE

Summer Solstice

Friday, June 15, 2017

Fall Gala

Friday, October 13, 2017

Themes for fundraising events will be announced in late 2016.

VOLUNTEER

Interested in playing a part in the Foundation's work? We have opportunities for event volunteers and other special projects! Please phone ext. 7884 for more information!

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Terwilliger Plaza Foundation

We offer thanks to the following individuals who contributed so generously to the Terwilliger Plaza Foundation between April 1, 2016 and September 30, 2016 especially those who responded to the Spring 2016 Appeal, supported the 2016 Summer Solstice, and supported the 2016 Fall Gala.

Terwilliger Plaza Foundation

April 1, 2016 and September 30, 2016

GIFTS IN MEMORY

In Memory of Art Dodd
+Twelfth Floor Members
of the Tower
#Eileen Markson
In Memory of
John "Jack" Beatty
Eileen Markson
Mary Lou Stewart
Tenth Floor Members
of the Tower
In Memory of Eleanore
"Ellie" Brandenbaugh
Third Floor Members
of the Tower
In Memory of Michael Cohen
+Allen Dobbins
In Memory of Mitzi Ellis
+Don and Edythe Barr
Clifford Droke and
and Diane Pinney
+Tom and Carolyn Gavin
+Mary Ellen Higgins
+Jim and Lynn Manuel
***Carolyn Savage
In Memory of Chuck Cory
Ninth Floor Members
of the Tower
Katharine McDuffie

GIFTS IN MEMORY

In Memory of
Gloria Hoffman
+Anonymous
Tenth Floor Members
of the Tower
In Memory of Lois Janzer
**Third Floor Members
of the Tower
In Memory of
Margaret Jesuale
+Seventh Floor Members
of the Tower
In Memory of Donald Kessler
Fourth Floor Members
of the Tower
In Memory of
Marvin Knutson
Allyn and Patricia Rieke
Eighth Floor Members
of the Tower
In Memory of
Ernest A. Liden, Jr.
Bette Liden
In Memory of Delight Lorenz
+Don and Edythe Barr
+Flora Barrows
Hugh and Shirley Harcourt
#Eileen Markson
D. Elizabeth Reid

GIFTS IN MEMORY

Tenth Floor Members
of the Tower
In Memory of
Norman F. Maves Sr.
+Margaret Maves
In Memory of Bob McDowell
+Don and Edythe Barr
+Pat Berg
Clifford Droke and
Diane Pinney
Fifth Floor Members
of the Tower
Pat Mahone
+Eileen Markson
Eleanor Mattersdorff
+Katharine McDuffie
Marguerite Metcalf
D. Elizabeth Reid
In Memory of
J. Robert McGill
+Eileen Markson
In Memory of Esther Moore
Al Goudy
In Memory of Jan Pedersen
Flora Barrows
Jane Goeth
Mary Lou Stewart
In Memory of Sam Roller
Mary Myers

GIFTS IN MEMORY

In Memory of Ron Sellner
D. Elizabeth Reid
In Memory of Becky Short
**Carol Burns
Jean Cory
+Eleventh Floor Members
of the Tower
+D. Elizabeth Reid
Bob Schuberg
In Memory of Gordon Solie
+Don and Edythe Bar
*Ninth Floor Members
of the Tower
***Scott Philips
D. Elizabeth Reid
In Memory of Jane Willsea
+Don and Edythe Bar
Irene Etlinger
Fifth Floor Members
of the Tower
Hugh and Shirley Harcourt
+Eileen Markson
Marguerite Metcalf
D. Elizabeth Reid
John and B.J. Wittwer
In Memory of Marguerite
and Tom Wright
+John and B.J. Wittwer

GIFTS TO THE FOUNDATION

Anonymous (2)
Diana Baird
Mary Baumgardner
James R. Blackaby
Byron and Mary Dougan
Sheila Dougherty
#Barbara Geiger
Margaret Hamachek
David and Virginia Kingsbury
Bill Knodell
**Lynne Losh
Jim and Lynn Manuel
Donald and Linda Mather
Judy McNally
and John O'Lear
Philip and Barbara Parshley
Joan Rague
Nancy Rilling
Stuart Soll
Jean Thorpe
Rita Weissman
Rod and Carol Woodworth

IMPORTANT INFORMATION

*Lesta Hoel Current Needs
**Terwilliger Plaza Foundation Endowment Fund
***Swanson Classical Music Fund
+Terwilliger Plaza Foundation Unrestricted Fund
Dee Sellner Fund

We apologize if the name of any donor has been omitted from this list or misspelled for gifts received during this period. Please inform us of the error by contacting Brenda Ray Scott at 503-808-7884 so that we may correct the error.

Celebrating Gifts to the Foundation and Fund

TERWILLIGER PLAZA FOUNDATION

GIFTS IN HONOR

In Honor of Joe and Misako Allerdice
 #Brenda Ray Scott
In Honor of Don and Betty Balmer
 ***Barbara Geiger
In Honor of Pool Playing Buddies Jean Cory and Beth Reid
 Brad Mersereau
In Honor of Robin Droz
 #Brenda Ray Scott
In Honor of 60th Wedding Anniversary
 Tom and Colleen Foster
In Honor of Betty Gedney
 Jerome Klefner
In Honor of Diane Gibson
 #Brenda Ray Scott
In Honor of Shirley Holland
 #Brenda Ray Scott
In Honor of 60th Wedding Anniversary
 John and Peggy Law
In Honor of Brad Mersereau
 ***Carolyn Savage
In Honor of D. Elizabeth Reid
 #Brenda Ray Scott
In Honor of Dee Sellner
 #Diane Gibson
 #John O'Lear and Judy McNally
 #Philip and Barbara Parshley
 #Brenda Ray Scott
In Honor of Edith Spickerman
 #Brenda Ray Scott

Lesta Hoel Memorial Trust Endowment Fund

April 1, 2016 and September 30, 2016

GIFTS IN MEMORY

In Memory of
 John "Jack" Beatty
 *James R. Blackaby
In Memory of Howard Geist
 *Diane Gibson
In Memory of
 Gloria Hoffman
 *Sue Beardwood
 *James R. Blackaby
 Irene Etlinger

GIFTS IN MEMORY

In Memory of
 Beverly Partridge
 John Partridge
In Memory of Jan Pedersen
 Fourth Floor Members
 of the Tower
In Memory of Mary Wilde
 *Diane Gibson

LESTA HOEL FUND GIFTS IN HONOR

In Honor of John and Mary Dimond
 Bill and Barbara Leighton

LESTA HOEL FUND

Eileen Elliott
 Jean Masonek
 Bert Shafer

GIFT DESIGNATIONS

*Lesta Hoel Current Needs

TERWILLIGER PLAZA FOUNDATION

VEHICLE DONATION

Mary Ellen Higgins
 Volunteers of America

MATURED CHARITABLE GIFT ANNUITY

Mitzi Ellis

LESTA HOEL AND THE LASTING LEGACY OF A BEQUEST



Lesta P. Hoel

Lesta Hoel's bequest was pivotal to creating the legacy of the Lesta Hoel Memorial Trust Endowment Fund. Over the years, it has experienced dramatic growth through the additions of other bequests. Making a bequest to the Lesta Hoel Fund or the Terwilliger Plaza Foundation offers a way to have a lasting impact after your lifetime and to be recognized during your lifetime.

The following is a sample of testamentary language that can be used for this purpose, "I give _____ dollars or ____ percent of the (rest, residue, and remainder of my estate) or (a specific asset) to the Terwilliger Plaza Foundation (or the Lesta Hoel Memorial Trust Endowment Fund) for general purposes of the Terwilliger Plaza Foundation as recommended by the Foundation's Board of Directors." Contact your legal advisor for exact language and to change your will. Donors contributing \$10,000 or more are eligible for membership in the Cornerstone Club. Contact Brenda Ray Scott at 503-808-7884 with questions about the Foundation, the Lesta Hoel Fund, or the Cornerstone Club.

Terwilliger Plaza Foundation

SUMMER SOLSTICE: KENTUCKY DERBY

OFF TO THE RACES

Nearly 112 guests enjoyed this year's annual luncheon, which featured a 'Derby Day' inspired menu and signature mint julep as well as a serenade from Terwilliger Plaza's very own Plaza Chorale lead by Member Ann Neuman. There were hats galore as you can see in photos on the photographer's page at <http://bit.ly/SS2016KentuckyDerby>. This year's event raised more than \$6,350 to support the Foundation in making grants that enhance the quality of retirement living at Terwilliger Plaza.

This year's program featured a special performance by the Plaza Chorale, directed by Plaza Member Ann Neuman, singing memorable horse racing songs including the beloved and familiar "Fugue for Tinorns" from the Broadway musical *Guys and Dolls*, folk ballad "Stewball", and Stephen Foster's "Camptown Races". The Chorale was accompanied by Ann on guitar, their accompanist Jerry Lindgren on piano, and Ibby Brooke on banjo. A special thank you to the Chorale Director Ann Neuman for preparing such a wonderful program.

Special thanks to our sponsors, patrons, ticket purchasers, and contributors who supported the event. Thank you also to the many staff and departments that contributed their time and talents to the producing the event!

SPONSORS

BUSINESS SUPERSTAR

Bullard Law

BUSINESS SUPPORTERS

Apollo Drain & Rooter Service, Inc.

Portland Lighting, Inc.

Recology Portland Inc.

SPECIAL THANKS

In-Kind Support

Casa Bruno

Ticket Sellers

Joan Cooper

Mary Ellen Higgins

Barbara Parshley

Beth Reid

Al Rieke

Pat Rieke

EVENT PATRONS

Joe and Misako Allerdice
Kitty Bassett
Mary Baumgardner
Pat Berg
James R. Blackaby
John and Joan Cooper
Jean Cory
Clif Droke and
Diane Pinney
Allen Dobbins
Stephen Fekety and
Linda Rockwell
Paul and Marie Fellner
Tom and Carolyn Gavin
Mary Jane Goeth
Al Goudy

Marva Guenther
Nancy D. Haigwood
Katherine Hart
Lee Hascall
Mary Ellen Higgins
Shirley Holland
Dorothy Johnson
James and
Joan Jozwiak
Bill Knodell
Peter and
Cynthia Lewinsohn
Lynn Manuel
Eileen Markson
Marian Martinez

Larry and
Sally McLaughlin
Ruth Mendelsohn
Marguerite Metcalf
Roma Morthland
Mary Myers
Marie Nylan
Elizabeth Olson
Frances Ousley
Philip and
Barbara Parshley
Jeanne Pendergrass
Robert and
Patricia Peterson
Scott Philips

Shirley Phipps
Tom and
Joanne Rannells
D. Elizabeth Reid
Al and Pat Rieke
Nan Jean Roller
Rose Rustin
Ethel Stevens
Mary Lou Stewart
Marjan Wazeka
Sabine Wild
Bill Wilson
John and B.J. Wittwer
Rod and Carol
Woodworth
Robert and Evelyn Wulf

SPECIAL EVENT THEMES

Please feel free to contact Brenda Ray Scott at Ext. 7884 with your suggestions about themes for future special events or if you have suggestions about potential sponsors.

(photos continued on next page)

Terwilliger Plaza Foundation

Kentucky Derby



Plaza Members Bob and Pat Peterson
Photo Credit: Shirley Holland



Plaza Members Bill Wilson
and Jim Blackaby



Best Creative:
Plaza Member Nan Jean Roller



Best Theme Related Hat:
Plaza Member Sally McLaughlin

Ways to Give

CHARITABLE GIFT ANNUITIES AS A LIFE INCOME SOURCE!

Have you considered establishing a Charitable Gift Annuity (CGA) as an income source and to reduce your tax liability while helping the Terwilliger Plaza Foundation or the Lesta Hoel Fund? A charitable gift annuity is a contract under which a charity, in return for a transfer of cash or other property, agrees to pay a fixed sum of money for a period measured by one or two lives. The maximum number of annuitants is one individual or one joint annuity.

Payments are made on a quarterly basis. The payment received can be significant. For example, the annual payout rate for an 84 year old woman creating a \$10,000 annuity would be 7.9 percent and result in an annual payment of \$790.00, most of which is tax free. The Foundation and Fund have many donors enjoying these benefits. Now is a great time for you to enjoy the benefits as well. For a **free and confidential illustration**, please call Brenda Ray Scott at Ext. 7884.

DONATE YOUR VEHICLE

Are you finding that you're no longer using your car, but not sure how to dispose of it? Have you considered donating it so that the Terwilliger Plaza Foundation can realize a benefit from your unwanted vehicle and you receive a charitable deduction?

Contact the Foundation's partner Charity-Connections at 503-239-7944 or <http://charity-connections.org/index.php/site/partner-donate/terwilliger-plaza-foundation> to arrange a vehicle pick-up for your convenience.

Call Brenda at Ext. 7884 to learn more about donating your vehicle to the Foundation!

Fred Meyer Community Rewards

This program is growing! Between July 1 and September 30, 2016, the Foundation received \$85.47 with 18 households contributing through the program. Our thanks to those households for electing to support the Foundation in this way.

For those of you who did not re-register before, July 1 and those of you who want to join, please see the back page of this newsletter for detailed instructions and the link for making this connection.

(see back cover)

Terwilliger Plaza Foundation

WELCOME TO NEW PLAZA LEADERSHIP



Terwilliger Plaza President and CEO
John Larson



Terwilliger Plaza V.P of Finance and CFO
Judy O'Donnell

John Larson joined Terwilliger Plaza on June 6, 2016 as the organization's new President and CEO. Larson has been a leader in the senior living industry for 28 years. Most recently he served in executive roles for two Continuing Care Retirement Communities (CCRCs) with Pacific Retirement Services: Mirabella of Seattle and Holladay Park Plaza of Portland. We are delighted to have John leading the Plaza including working with the Foundation.

Judy joined the Terwilliger Plaza team on August 15, 2016. She is a 3rd generation Oregonian who earned her BS degree in accounting from Portland State University and her CPA license in 1985. She worked in public accounting for many years. For the past 10 years she has worked in for profit senior living and property management.

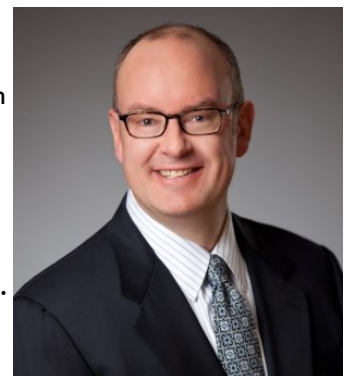
WELCOME TO NEW FOUNDATION BOARD MEMBERS

Emily Bradford joined Geffen Meshner in 2008 and provides auditing and accounting services to its clients in a variety of industries, including professional services, forest products and manufacturing. She provides her clients a range of consulting services, including design and effectiveness of internal controls for financial reporting as well as for employee benefit plans.



Emily Bradford

Jackson Lewis serves as an Estate Planning Attorney with leading law firm Tonkon Torp LLP. He possesses nine years of board service with Broadway Rose Theatre Company as well as experience with fundraising. His desire to serve relates to wanting to learn more about the work of a life plan community and to serve his community.



F. Jackson Lewis II

Terwilliger Plaza Foundation

Foundation Says Good-Bye to Charles Lutton

In late October, 2016, Terwilliger Plaza Foundation lost a legend. Charles "Chuck" Lutton played a critical role in the Foundation's creation. Chuck served the Plaza community in many ways from serving on the Terwilliger Plaza Board of Directors and as a Trustee of the Lesta Hoel Memorial Trust Fund early in his "Terwilliger" career. It was during his service on the Plaza Board that he helped found the Terwilliger Plaza Foundation, which is marking its 25th anniversary.

Eventually, Chuck served for five years on the Terwilliger Plaza Foundation Board of Directors later in that career. Chuck also served as a member of the Plaza's Finance, Investment Advisory, and other committees such as the Library Committee where he served as Treasurer.

He supported the Foundation in many ways including donating regularly and going the extra mile to become a Member of the Cornerstone Club! He and his wife Ethel were recognized as Donors of the Year for 2005! In 2012, he was recognized as the Spirit of Giving honoree for consistently contributing to the Foundation nearly every time he was asked and even when he hadn't been asked! Chuck also provided wise counsel when he thought it helpful. He will be missed.



Charles "Chuck" Lutton

FOUNDATION MEMORIES

As you know, the Foundation is celebrating 25 years of enhancing the Terwilliger Plaza community by providing support for projects directly benefiting Members and assisting the Lesta Hoel Fund, as needed, with providing support to Members who require financial assistance. Do you have a special story to share about the Foundation? Do you have photos to share? Please contact Brenda Ray Scott at Ext. 7884 or bscott@terwilligerplaza.com to offer your unique stories or photos of the Foundation's impact.

NEW FOUNDATION BOARD MEMBER

Eileen Markson moved to Terwilliger Plaza in September, 2004 following a successful career in academia as an art librarian.

Having grown up in Portland, the move to Terwilliger Plaza was a homecoming of sorts. During her time as a resident, she has been involved in many activities especially serving for many years as editor of the Terwilliger Times and as a devoted committee member for the Community Benefits committee. She was recognized as the Spirit of Giving honoree for 2012.

As a member of the Foundation's board, Eileen seeks to carry on her enthusiasm and commitment to the Plaza as a community and to the Foundation's role in enhancing the retirement living experience.



Eileen Markson

FALL GALA 2016

This year's Fall Gala: The Great Gatsby took place on Friday, October 14, 2016.

Watch a future Foundation newsletter for an article about the event accompanied by photos.

In the meantime, visit the following site to see all photos:

<http://bit.ly/FallGala16all>

Thank you again for your support in making the Fall Gala a success!

Terwilliger Plaza Foundation
2545 SW Terwilliger Blvd.
Portland OR 97201
Phone: 503-808-7884
bscott@terwilligerplaza.com

Board of Directors

Mary Ellen Higgins, President
Tom Gavin, Vice President
Lynn Manuel, Secretary
Bill Knodell, Treasurer

Emily Bradford
Harmon P.W. Laurin
F. Jackson Lewis II
Eileen Markson
D. Elizabeth Reid

Executive Director: Brenda Ray Scott, CFRE

<http://www.terwilligerplaza.com/retirement-community/foundation/>

SUPPORTING THE FOUNDATION WHILE YOU SHOP

Terwilliger Plaza Foundation has joined the growing list of non-profits who work with for profit companies who make charitable gifts based on the shopping habits of generous supports like you! Our thanks to the many supporters who have started supporting the Foundation through one or both of this online portals. With the holiday shopping season upon us, it seemed like the right timing to remind you that the Foundation is officially apart of AmazonSmile and Fred Meyer Community Rewards. Here is more information about how it works:



For many shoppers, Amazon is an essential part of how they shop online. Make your shopping count year-round by using AmazonSmile as you shop on Amazon. This is a wonderful way to support the Foundation while getting your shopping done.

Visit the link below to be taken directly to where you can sign in and select Terwilliger Plaza Foundation as the charity to receive your donations generated through shopping at AmazonSmile:

smile.amazon.com/ch/93-1062307



The number of households participating and donations are continuing to increase. Please consider adding your household to those supporting the Foundation. Our code is 82059. (Joining this program **does not** impact the rewards you receive as a shopper.)

Visit the following website and scroll down to register your Fred Meyer Rewards Card in this program:

<https://www.fredmeyer.com/topic/community-rewards-4>