



WILLAMETTE VIEW FOUNDATION

2016 ANNUAL REPORT

Our Purpose

To help residents of Willamette View live worry free about money matters.

Our Promise

Even if you outlive your resources, you can get help from us.

Our Position

Independent, enduring, and uniquely dedicated to Willamette View residents.

Our Personality

Financial assistance is what we do. Empathy and compassion is who we are.

Our Performance

We measure our services one person at a time. And by strengthening the whole community over time.



A clear vision

Sometimes, you just need a hug. That's what Willamette View Foundation is here to give. A hug when your financial affairs lead you to a time when you need it most. We are here for that much-needed support. We all would like to have a crystal ball that enables us to see into the future; that would make planning for it so much easier. Then we'd know exactly how much we need to save and how much we can spend.

Willamette View Foundation was created to be a safety net for Willamette View residents whose savings do not quite meet the needs that life has thrown their way. We stand ready to throw our arms around you and have the resources to relieve you and the community from the burden of housing and care costs that are beyond your means.

We've been supporting residents for nearly 50 years. Our resources come from donations, bequests, and investment earnings. The Foundation's reserves are a testament of a deep-rooted intent to help each other by creating a pool of resources for supporting those in need. Since the first dollar in 1969, nearly \$10 million has been paid to Willamette View for support of residents in need. Undesignated donations have also allowed us to make grants for campus projects which benefit all residents, enhancing lives without cost to the community. That's a history of providing security for residents of Willamette View; a priceless gift.



Spread the word to your neighbors and friends,
we've got hugs to go around.

Warmly,

Diane

Diane Wernli
Executive Director

This is the place you can turn to for financial help

Our primary goal is help residents of Willamette View maintain financial security. We do this by supporting them in the event they exhaust their resources or by helping them manage their daily bills and expenses.

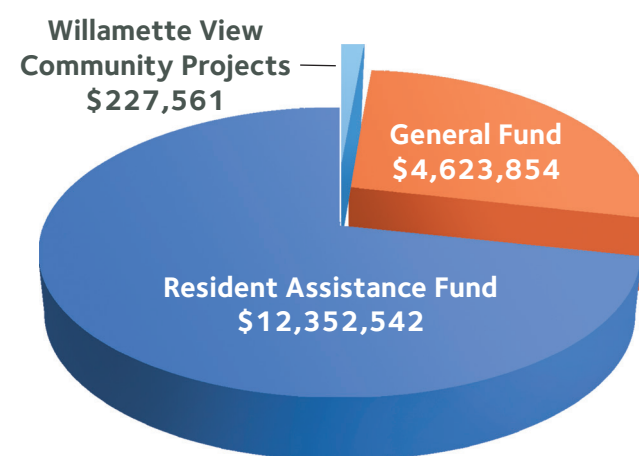
We can provide this help because of the generosity of donors. Most of our donors lived at Willamette View and understood the value of our mission. The Foundation's core mission of helping people is their legacy.

We consistently provide services to approximately five percent of the Willamette View community. Even though most residents will never need our services, those that do need help are tremendously grateful that we're here -- most of them never dreamed they would need assistance.

Whenever we help a resident in need, it is all strictly confidential.

In our 49 years of helping residents, our investments have also continued to flourish through careful financial management. The graph below shows the reserves our donations and resources have grown.

Net Asset Balances at December 31, 2016



“The Foundation has removed the stress of paying for our parents to live out their lives in a familiar place.”

“Thanks always for the wonderful support of the Foundation on my mom's behalf. We feel completely blessed with the financial assistance she received for her care in Trillium neighborhood.”

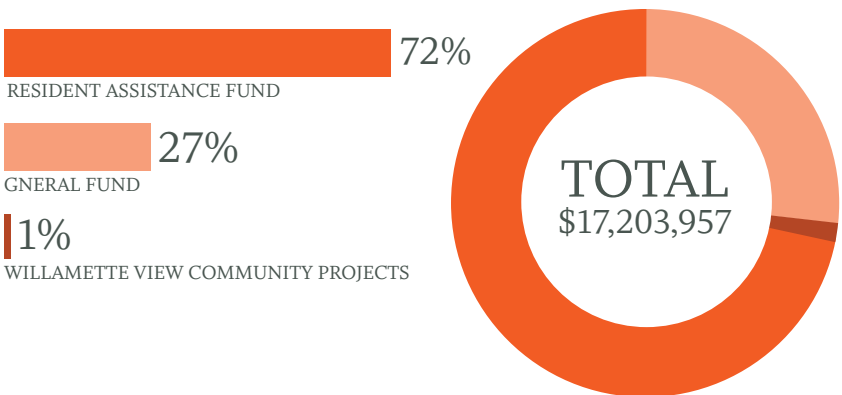
“Absolute relief. The family was so thankful when we found out that the Foundation would help us with so many of the details when our parent's health started to deteriorate, and they needed more care than we could afford to pay.”

Fund Balances and Financial Facts

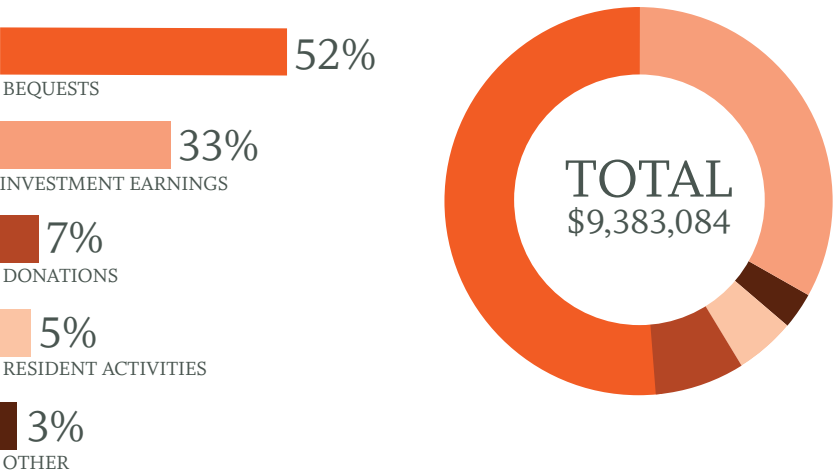
As of December 31st

	2009	2010	2011	2012	2013	2014	2015	2016
Resident Assistance Fund	\$8,716,406	\$9,313,712	\$11,217,507	\$11,857,797	\$12,632,081	\$12,564,161	\$12,164,232	\$12,352,542
General Fund	3,004,938	3,241,006	2,815,021	4,401,046	4,301,825	4,472,422	4,484,537	4,623,854
Willamette View Community Projects	36,994	41,844	39,167	41,508	257,942	267,173	223,102	227,561
Bus Fund & Other Designations	28,859	74,734	6,871	9,398	8,389	6,784	0	0
Total Net Assets Balances	\$11,787,197	\$12,671,296	\$14,078,566	\$16,309,749	\$17,200,237	\$17,310,540	\$16,871,871	\$17,203,957
Donations	\$20,249	\$131,770	\$37,532	\$141,007	\$204,441	\$91,668	\$34,075	\$7,090
Bequests	737,936	60,757	2,705,777	942,232	130,376	108,083	117,689	77,819
Resident Activities	77,641	73,034	87,944	71,228	79,077	80,751	40,049	0
Investment Earnings	316,692	326,479	343,374	467,216	275,743	361,605	578,874	383,301
Other	80,101	22,687	60,181	19,325	15,642	23,619	37,299	12,721
Total Revenue	\$1,232,619	\$614,727	\$3,234,808	\$1,641,008	\$705,279	\$665,726	\$807,986	\$480,931
Resident Assistance Provided	\$265,785	\$245,921	\$221,473	\$338,976	\$422,494	\$265,788	\$347,031	\$320,099

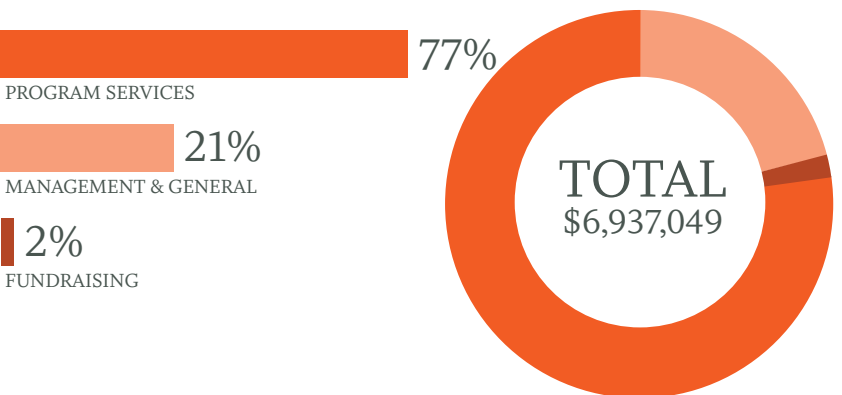
Fund Balances 12/31/16



Revenue by Source 2009-2016



Expense by Function 2009-2016



To view our complete 2016 Audit Report go to our website at willametteviewfoundation.org, or give us a call at 971-233-8956.

Adding to the quality of life

Not just through direct financial support, assistance with daily finances, and the peace of mind that comes from knowing there is a funded safety net awaiting a need, the Foundation is also that friend quietly working behind the scenes to improve daily life.

Through the years some donors have either dedicated their donations to community projects or allowed their gifts to be directed to the General Fund. It is with these resources that the Foundation has contributed to various campus projects.

Many of the grants to Willamette View, Inc. have funded aspects of everyday life at Willamette View. The campus Philips Lifeline system which provides personal help buttons to all residents was funded by a grant to Willamette View, Inc. This system allows residents access to help 24/7 from anywhere on the campus. Have you taken a shuttle bus to shopping? Spent a peaceful afternoon exploring one of the campus libraries? Worked out on the fitness center equipment? Taken the manor elevators to and from the dining room? These are a few of the ways the Foundation touches lives.

Grants to Willamette View, Inc. from Willamette View Foundation from 2002-2016

Project	Amount
Greenhouse	\$7,500
Terrace Auditorium Sound System	\$8,000
In-House Cable System	\$14,000
Main Auditorium Upgrade	\$112,649
Wellness Center	\$170,226
CarePoint/Lifeline System	\$311,901
Carousel remodel	\$10,000
Terrace Library and Reception Remodel	\$343,976
Riverview Dining Chairs	\$125,000
Artworks	\$60,000
Buses	\$129,953
Court Library Remodel	\$286,192
Main Auditorium Sound System	\$69,000
Elevator and Restroom Upgrades	\$400,000
Bus Fund (Balance Transferred to WVI)	\$6,683
Community Projects Fund (Balance Transferred to WVI)	\$8,361
	\$2,063,441



A strong purpose

I'm writing to you today for the first time as your Foundation Board President. As most of you know, Dave Louthan retired in May after 20 years of dedicated service to the Willamette View Foundation. I wish to convey my promise of continued diligence and support of those in our care. As we enter our sixth decade of unwavering support, our Purpose and Promise have not changed while our independence and financial assistance requires that we remain focused on our mission.

The Board is diligent about maintaining our capability to carry out that purpose. Strict and sound financial principles have guided the Foundation through many market trends. The Foundation's investments are managed by Angeles Investment Advisors. The broadly diversified portfolio performed well in 2016, generating a 7% return and positioning us for potential growth during the upcoming year.

Over the years, the Foundation board has worked intently to grow reserves, reserves that will sustain us into perpetuity. We plan to be here as we have in the past for all the current residents as well as every new resident that joins our community in the future. The Foundation provides valuable peace of mind, we plan to make sure we are adequately funded to continue our mission for generations to come.



The residents of Willamette View are the heart and soul of our Foundation, and I wish to take this opportunity to thank you for your support.

Remember, we all need each other.

Sincerely,

Christie L. Geiger

Christie L. Geiger
Board President

BOARD OF DIRECTORS

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Carol Cameron
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Thomas DeSouza
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Board Member

Robert Potter
Board Member

EXECUTIVE TEAM

Diane Wernli
Executive Director

Christy Noble
Administrative Assistant





WILLAMETTE VIEW
FOUNDATION

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Willamette View Foundation is a non-profit corporation separate and independent from Willamette View, Inc.