



# FOUNDATION FOCUS

A PUBLICATION OF WILLAMETTE VIEW FOUNDATION

VOLUME 24, November 2021

## Are your finances ready for the holidays?

*Here are a few tips for keeping your finances under control during the holiday season.*

### **Set a holiday budget:**

Before the holiday madness starts, take a look at your budget and figure out how much you can reasonably spend on gifts and holiday merriment. Knowing your total budget in advance is the best first step to making sure things stay under control this holiday season.



### **Reduce unnecessary expenses:**

Take a look at your bank account or credit card bill. Is there anything you normally “splurge” on that you could cut out this month? This is a good time to review some of your spending habits.

### **Make a list and prioritize it:**

Determine your top financial priorities for this holiday season and make sure you allocate budget to those first. For the non-essential purchases, think about where you could save a little by making a homemade gift or “giving” your time instead.

### **Track your holiday spending:**

Document every gift, hostess gift, new holiday outfit, so you can easily track how much you are spending vs. how much you have left in your holiday budget.

## LETTER FROM DIANE

As we begin another holiday season, we wish you peace and happiness. Willamette View Foundation celebrates 54 years of serving residents this month. We are grateful for the support of so many residents through the years; grateful to have been able to help over 250 Willamette View residents pay their Willamette View bills.

Our purpose is to be here when residents need financial help, and our resources are available for that purpose. All of our funds have come from donations, bequests, gift annuities, and earnings from investments. We are grateful that up until 2014, Willamette View Foundation also received all the proceeds from the three resident stores. We do not receive any funds from Willamette View nor any portion of your initial entrance or monthly fees.

We exist because residents and their families have believed in our mission to support residents when there is a financial shortfall, and we are honoring their intentions.

Enjoy the weeks ahead and look forward to the new year with enthusiasm, hope and comfort. If you need us, we will be here.

Warmly,

*Diane*



## Simple Acts of Kindness

### Practicing Positive Thinking to Live a Happier Life

Practicing positive thinking is an essential part in living a happier life. Here are some ways to increase happiness.

#### **Tell someone how much they mean to you.**

Telling someone how much they mean to you goes a long way to cultivate happiness. Once a person knows how much you appreciate them, it opens up new relationship opportunities.

#### **Show respect for those around you.**

If we want to be treated with the same level of courtesy we expect to receive, we have to smile, show kindness, exhibit patience, and listen.

#### **Do something unexpected for someone.**

Try doing something nice unexpectedly. Once you do this act of gratitude, you will begin spreading positivity.

#### **Give hope and encouragement to someone in need.**

Giving hope and encouragement is one of the most life-changing gifts you can ever give to someone. As long as a person has hope, they can recover from anything and everything.

<https://spiritualfitclub.com>







## Welcome to the Board, Greg Dufault

We are pleased to welcome Greg Dufault to Willamette View Foundation's Board of Directors. Greg has been in the investment business for 39 years and is currently the Managing Director of Dufault, Smith & Meeuwssen Wealth Management Group of Wells Fargo Advisors in Lake Oswego, Oregon. He was the President, Board Chair, and Co-Founder of Raphael House in Portland; President and Board Chair of Wordstock; Board Chair and Board Member of the Catlin School in Portland. In addition, Greg has served on the Willamette View Foundation Investment Committee since 2012. He is a licensed pilot, avid golfer, and fly fisherman. He brings a wealth of experience and we are pleased to have Greg as part of our team.

## What you can do now to prepare for filing your Tax Returns

While you will not start filing your tax returns for a couple months, there are a few things you can do to make the process easier next year.

Start to accumulate your tax documents and receipts. Identify a place to keep all of your tax return support. Watch for any 1099 forms that you should receive. Gather medical and pharmacy receipts and support from your doctor visits.

Make sure you have acknowledgments for all charitable donations. If you plan to claim a charitable deduction on your tax return, make sure to get a written statement from the charity for any single donation of \$250 or more. If you've misplaced your receipt, contact the charity now to obtain the documentation, they won't be as busy if you request a duplicate early.



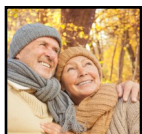
## Willamette View Foundation

11226 SE 21st Ave

Portland, OR 97222

ADDRESS SERVICE REQUESTED

### IN THIS ISSUE



#### ***Are your finances ready for the holidays?***

*Page 1*



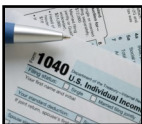
#### ***Simple Acts of Kindness***

*Page 2*



#### ***Welcome Greg Dufault***

*Page 3*



#### ***Prepare for tax filings***

*Page 3*

## WILLAMETTE VIEW FOUNDATION 971-233-8956

**Diane Wernli**, Executive Director  
[diane@willametteviewfoundation.org](mailto:diane@willametteviewfoundation.org)

**Christy Noble**, Business Operations Mgr.  
[christy@willametteviewfoundation.org](mailto:christy@willametteviewfoundation.org)

### FOUNDATION BOARD OF DIRECTORS

Christie Geiger- President

Mike Gallagher- Vice President

Ron Gustafson- Secretary/Treasurer

Carol Cameron

Greg Dufault

Elise Meyers

---

**THE FOUNDATION'S MISSION** is to help qualified residents of the Willamette View Retirement Community maintain their dignity and independence through assistance in satisfying their need for housing and financial security. Aid is provided through resident assistance and financial management programs, educational seminars, financial information service, publications and grants to Willamette View, Inc. that benefit the community's residents.

---

### ***Warm up for your walk!***

It's important to warm up before exercising...even walking. Walk at a slow pace to a bench or low wall on which you can balance yourself. Slowly stretch your calves, hamstrings, hips and thighs; just a few minutes of stretching does the trick. This also helps maintain your flexibility.

