



# FOUNDATION FOCUS

A PUBLICATION OF WILLAMETTE VIEW FOUNDATION

VOLUME 34 November 2024

## *Enjoy the Holidays*

*The end of the year holidays are quickly approaching, make them even more pleasant this year.*



### ***Stroll down memory lane:***

Holidays provoke memories. Share stories and observations from the past with family and friends. Break out the photo albums, family videos and music to evoke memories and help recall stories and experiences. See who can share the funniest story; the process will have everyone smiling.

### ***Watch a holiday movie:***

Watching a holiday classic is a must do during the holiday season. Invite your loved ones to join you or get together with friends.

***Walk outside:*** Make time for activities that will increase exposure to daylight. Going for a stroll or sitting on a bench will rejuvenate your senses. Throw some leaves for fun.

***Create new memories:*** Enjoy local activities that capture the holiday spirit. Check out the Milwaukie Tree Lighting and Winter Solstice Celebration which includes a decorated umbrella parade. The parade will begin at 4:30pm on Saturday, December 7th. It will start in Downtown Milwaukie near the Post Office on Main Street and end at Historic City Hall for the tree lighting.

***Be social:*** It's a perfect time to invite friends over to share in a visit. Getting together with friends to show your appreciation for their friendship is a perfect holiday tradition. Make it a game night with Rummy, Quiddler, Yahtzee, or any of your favorite games.

***Make handmade cards:*** Create holiday cards from craft materials and send them to your family and friends during the holiday season.

## LETTER FROM DIANE

As we are beginning another holiday season, I wish you peace and happiness.

Willamette View Foundation is celebrating 57 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 pay Willamette View bills helping over 250 Willamette View residents.

We exist because residents and their families have believed in our mission to support residents when there is a financial shortfall or a need for financial guidance. We are grateful for all of our donors.

Enjoy the weeks ahead and look forward to the new year with enthusiasm, hope and comfort.

Happy Holidays to all of you.

Kindest regards,

*Diane*



## What you can do now to prepare for filing your 2024 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 gathering your tax documents and receipts. Identify a place to save 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 acknowledgements for charitable donations. If you plan to claim a charitable deduction on your tax return, make sure to get a written statement from the charity. If you've misplaced your receipt, contact the charity now to get the documentation, they won't be as busy if you request a duplicate early.





# 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? Maybe re-think some of your spending habits. Cancel unused subscriptions and streaming services.

## **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.

Source: <https://lendingclub.com>

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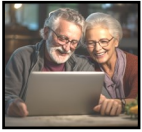
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### FOUNDATION BOARD OF DIRECTORS

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**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.

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### ***Embrace Fall & Lift holiday spirits when you...***

- ◆ Pay someone a compliment
- ◆ Send a loved one a letter
- ◆ Smile at everyone you see
- ◆ Give someone a hug
- ◆ Volunteer your time

