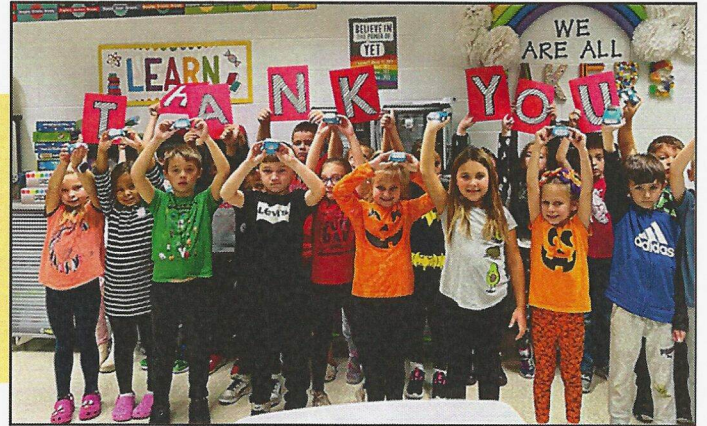




THANK YOU

For your thoughtful consideration in making a gift to the Oregon Schools Foundation's Endowment Growth Campaign.



DEAR

Oregon Schools Foundation has launched a 90 day Endowment Growth Campaign.

In partnership with Brent Shimman and Frank Dobnikar, owners of S&D Capital Financial Advisors, for the first time ever in OSF history, donations made to the Endowment Campaign in the next 90 days will be matched up to \$50,000.

"We are deeply grateful for your time, consideration, and unwavering support of this incredible Foundation. The funds raised for our students will help them develop the critical thinking, problem-solving, and collaboration skills that are essential for their success—both now and long after graduation.

The inspiring stories we've heard from students, staff, parents, and volunteers over the years have strengthened our belief in the importance of this cause. It's clear that the time has come to launch something we've worked tirelessly to bring to life.

From now until May 24th, 2025, every \$1,000 donation to our newly launched Endowment Growth Campaign will be matched dollar-for-dollar by S&D Capital, up to \$50,000! This is a fantastic opportunity to double your impact and build a lasting legacy for our Oregon City Schools students.

It truly takes a village, and we are so fortunate to have such a strong and supportive community. Let's continue to nurture that legacy together!" -S&D Capital Financial Advisors

We are extremely excited about this opportunity with S&D Capital. Your gift will ultimately impact our Oregon City School students for generations to come.

The student and teacher opportunities provided by OSF have been enriching and inspiring since 1991. Thank you very much for your consideration.

Please reach out directly with any questions you may have at 419-346-7363 or oregonschoolsfoundation@gmail.com.

Join us and Leave your Lasting Legacy!

Sincerely,

Amy L. Hansen, CHS '88

ENDOWED ASSETS MANAGED BY:

S&D Capital Financial Advisors
Brent Shimman & Frank Dobnikar
3150 Dustin Road, Suite 2
Oregon, Ohio 43616

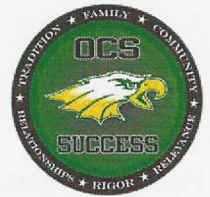
<https://sdcapital.org>
419-693-9000



S&D CAPITAL
FINANCIAL ADVISORS



Building Today for a Stronger Tomorrow



Currently, Oregon Schools Foundation (OSF) is focusing their efforts on *Endowment Fund* Growth, essentially building a nest egg for future income in perpetuity to support funding needs for Oregon City Schools under Academics, Arts and Athletics.

Directly linked to the Strategic Plan of Oregon City Schools (OCS), Oregon Schools Foundation is a key partner in helping OCS achieve creative funding mechanisms beyond the minimum state allocated funds.

The Oregon Schools Foundation was created in 1991 by local community members, parents, business leaders and district leadership. The initial founders raised and invested the \$50,000 principal that was designated as the *Endowment Fund*. The current balance of that original fund stands at \$675,000.

The spending policy on the endowed assets stands at up to 5%. The principal and earnings of the original endowed funds have never been drawn down. Board policy states that assets must reach at least \$500,000 before any drawdowns of interest only can take place. The principal has always remained in perpetuity.

The initiatives supported by OSF include Classroom Grants, afterschool Art Club supplies, kindergarten early-literacy reading support, and targeted priorities under Academics, Arts and Athletics.

OSF holds an annual dinner event raising the funds necessary to support the initiatives listed above. The annual Frost Fest dinner event raises approximately \$50,000/year to support these initiatives.

Our spending policy also states that 10% of non-designated gifts to OSF are invested in the *Endowment Fund* to continue to grow the nest egg. Since January 2020, \$89,921.48 has been invested.

In order to be more effective in providing educational funding for the extras beyond state minimums, we must increase the balance of the Endowment Fund. A \$1 mil endowment, with an annual spending policy up to 5%, will allow \$50,000 of additional funds for Academics, Arts and Athletics per year. A \$2 mil endowment, with the same spending policy, will allow \$100,000 of additional funds, and so on... The funds generated from an endowment principal would augment the incredible opportunities offered to our students.

It is, therefore, our goal to raise the balance of the Endowment Fund to \$1 mil.

As a contributor to our *Endowment Campaign*, you will have opportunities for recognition stated on the attached fact sheet.

We believe in the future of educational opportunities within Oregon City Schools, and know that we can continue the excellence in our district that our community expects. Would you consider a gift in perpetuity to the *Endowment Fund Campaign*, providing future generations of students in Oregon excellent educational opportunities?

Sincerely,

Gregory Row, President, Oregon Schools Foundation, CHS '89

Jim Fritz, Superintendent, Oregon City Schools

Amy L. Hansen, Executive Director-Oregon Schools Foundation, Development Director-OCS and CHS '88



Endowment Legacy Gifts

Platinum Eagle Legacy Recognition

- Includes Naming Rights on Fund and Designation
- XLarge logo or name placed on Donor Wall recognition
- Recognition as *Platinum Eagle Legacy level* on banner, website, signage, mailings, flyers, thank you ad
- Invitation to attend Donor Wall dedication
- Recognition plaque for personal display

Eagle Legacy Recognition

- Includes Naming Rights on Fund and Designation
- Large logo or name placed on Donor Wall recognition
- Recognition as *Eagle Legacy level* on banner, website, signage, mailings, flyers, thank you ad
- Invitation to attend Donor Wall dedication
- Recognition plaque for personal display

Gold Legacy Recognition

- Includes Naming Rights on Fund and Designation
- Medium logo or name placed on Donor Wall
- Recognition as *Gold Legacy level* on banner, website, signage, mailings, flyers, thank you ad
- Invitation to attend Donor Wall dedication
- Recognition plaque for personal display

Silver, Bronze, Green, OCS Legacy Recognition

- Name in incremental font sizes placed on Donor Wall
- Recognition as *Legacy level* on banner, website, signage, mailings, flyers, thank you ad
- Invitation to attend Donor Wall dedication
- Recognition certificate

Endowment Fund Campaign

\$1,000,000 GOAL

Platinum Eagle - \$100,000

\$50k/yr over 2 yrs or \$20k over 5/yr
1 Gift

Eagle Legacy - \$50,000

\$25k/yr over 2 yrs or \$10k over 5/yr
3 Gifts

Gold Legacy - \$25,000

\$12.5k/yr over 2 yrs or \$5k over 5/yr
4 Gifts

Silver Legacy - \$10,000

\$5k/year over 2 years or \$2k/yr over 5 yrs
5 Gifts

Bronze Legacy - \$5,000

\$2.5k/year over 2 years or \$1k/yr over 5 yrs
5 Gifts

Green Legacy - \$2,500

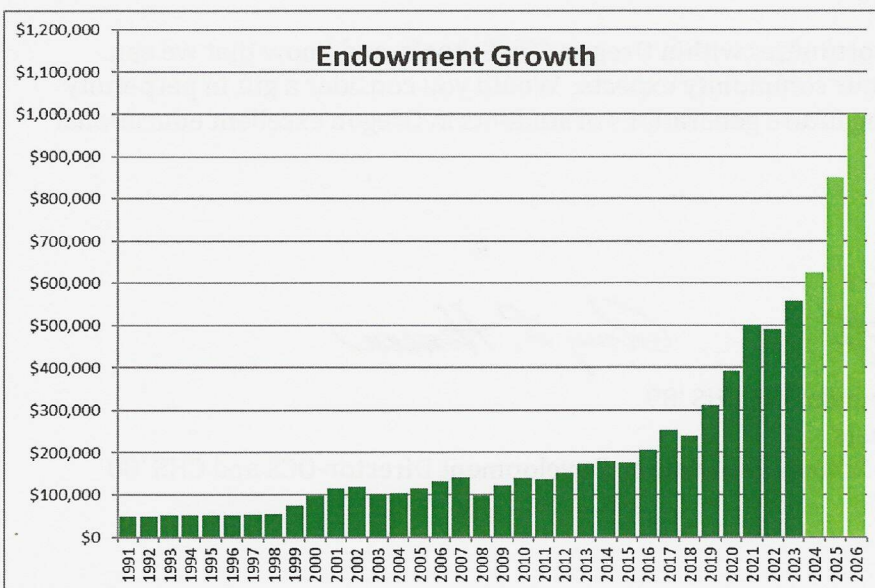
\$1,250/year over 2 years/ \$500/yr over 5 yrs
6 Gifts

OCS Legacy - \$1,000

\$500/year over 2 years/ \$200/yr over 5 yrs
50 Gifts

OSF's Dedication to Long Term Impact

The leadership team has been dedicated to Endowment Growth for over a decade. Significant growth is attributed to OCS Staff contributions, 10% of Frost Fest profit, other designated gifts and market growth. Achieving the \$1mil milestone by the 100th anniversary of the opening of Clay High School will be not only monumental, but incredibly impactful for our district, the students and teaching staff in perpetuity.



Endowment Fund Balance

Feb 2025 (current)	\$675,000
Platinum Eagle (1 gift)	\$100,000
Eagle Legacy (3 gifts)	\$150,000
Gold Legacy (4 gifts)	\$100,000
Silver Legacy (5 gifts)	\$50,000
Bronze Legacy (5 gifts)	\$25,000
Green Legacy (6 gifts)	\$15,000
OCS Legacy (50 gifts)	\$50,000
All gift levels filled	\$1,165,000

Timeline

Launch Endowment Campaign	Feb 2025
Legacy commitments secured by	Sep 2025
Dedication Wall Ceremony	Apr 2026



Long Term Planning

"Gifts in perpetuity impact students for generations."

Endowment Growth

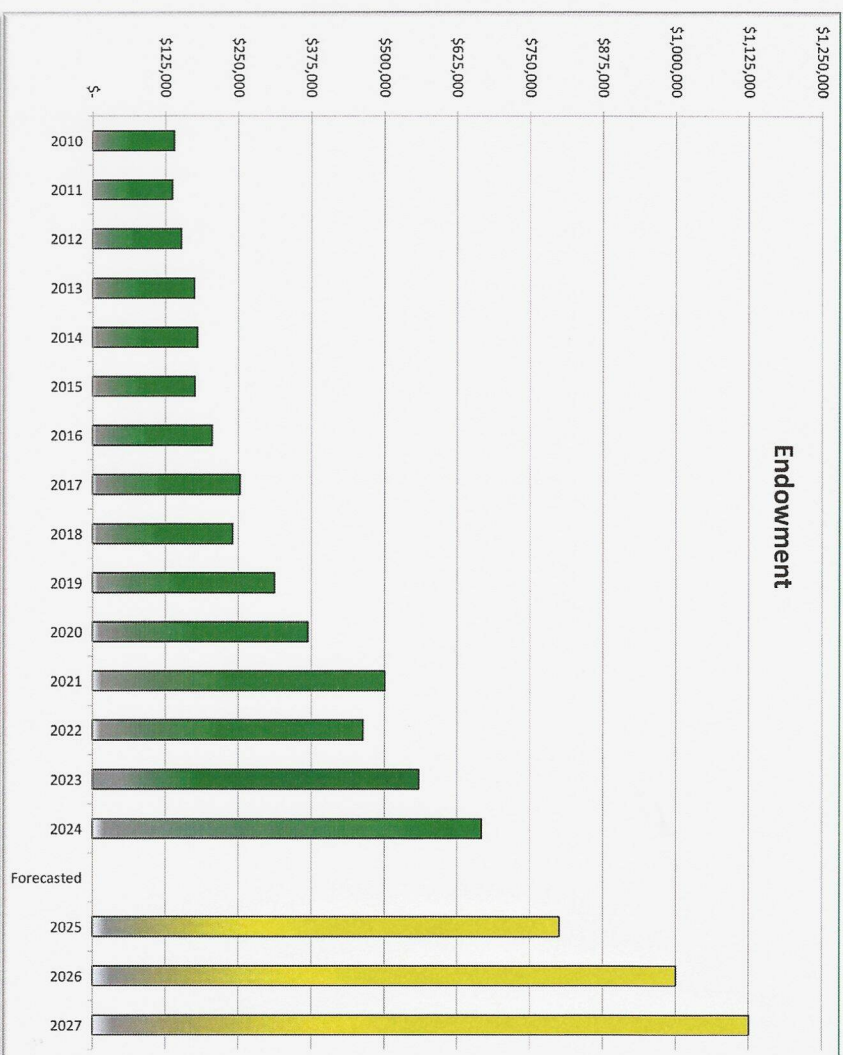
Endowed assets are investments kept in perpetuity to provide earnings for future needs. Endowed funds bridge the funding gap for future generations. OSF's goal is to reach \$1 mil within Endowment Fund by 2026.

Sustainable Income and Grants

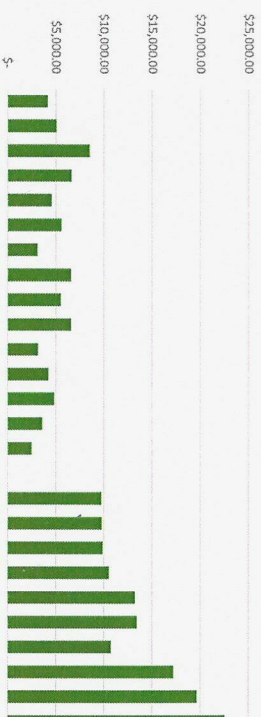
Sustainable income can be achieved through growth of the Endowment Fund. OSF's Spending Policy allows up to 5% of value to be distributed annually. No earnings have been allocated to date.

One of the original programs instituted in 1991, still exists today, **Classroom Grants**. Grants allow teachers to bring innovative and enriching opportunities into their classrooms. Founder's Grants since 2000 - \$211,383.

Oregon Schools Foundation's Endowment Growth Campaign



Founder's Grants
2000 - 2025



Alternate Forms of Donations

OSF can accommodate non-cash donations such as stocks or mutual fund transfers. Donor receives an immediate income tax deduction for the full market value of the securities transfer. In addition, donor pays no capital gains tax on the difference between the cost and the fair market value. Connect with Amy at OSF with questions.

Scan QR Code
to make an
Online Gift

