Making Dreams Come True

2016-17 Annual Report
A Message from the 2017-18 Foundation Board President

Dear OSCPA Members,

Having been a donor to The OSCPA Educational Foundation for a number of years and serving on the Foundation Board for the past few, I am excited to serve as president for this upcoming year! I would like to thank outgoing President Elizabeth Almer for her leadership over the past year. As an educator, she is a strong advocate for students across the state and recognizes that the costs to get an accounting education are continually on the rise.

As a mom of two teenage boys, the burden of college tuition is ever increasingly on my mind. How will they, with my help, pay for the education they seek without ending up with a significant amount of debt upon graduation? Will their high school and college grades, essay writing skills and demonstrated interests mean they fund a significant share of tuition with scholarship dollars? Will they live on Top Ramen, Mac & Cheese, and Pop Tarts as I did my freshman year because they have to, or will it be because that’s what 18 year old boys do on their own for the first time and don’t know how to cook? Will they have to work a minimum wage job in addition to attending classes full time? Coming from experience, that can make it difficult to prepare for a test anytime other than the wee hours of the morning.

“...students are the future of our profession and we hope that providing them with scholarships will keep them on track to pursue a career as a CPA and make their dreams a reality.”

Having to think through all of these issues on a personal level is one of the reasons I joined the Foundation Board a few years ago. Being part of a team that has the opportunity to partially relieve the stress of paying for college is very rewarding. This year the Foundation awarded scholarships to 45 students totaling $95,000. Since its inception, the Foundation has awarded more than $1.9 million in scholarships to over 1,200 students.

The OSCPA Educational Foundation is able to provide scholarships to these deserving students because of contributions from members like you. Every dollar makes a difference, so please consider making that contribution each year when you renew your membership. Check with your firm as well to see if they donate and if not encourage them to do so. For those in industry, don’t forget that some organizations will match your contribution, doubling the value of your support. These students are the future of our profession, and we hope that providing them with scholarships will keep them on track to pursue a career as a CPA and make their dreams a reality.

Sincerely,

Nikki L. Koblitha, CPA
2017-18 President
The OSCPA Educational Foundation
Your Generosity Helps Oregon Accounting Students Achieve their Dream of Becoming a CPA

Since 1985, you have made it possible for The OSCPA Educational Foundation to provide more than $1.9 million in financial assistance to over 1,200 deserving students. Each year, OSCPA members and their firms and businesses step up to ensure that we can continue to reward students’ academic success with financial aid.

The following donors generously made contributions between July 1, 2016 and June 30, 2017.

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($2,000 or more)
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Delap LLP
Deloitte LLP
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* These donors contributed to the Expedition100 campaign.

Every effort has been made to ensure the accuracy of this list. Please contact The OSCPA Educational Foundation at 503-641-7200 / 800-255-1470, edfound@orcpa.org, to report errors or omissions.
2017-18 Scholarship Awards

The OSCPA Educational Foundation awards scholarships to students based on their academic performance and their intent to pursue a CPA career and work within the state of Oregon. Many of these students need financial support to make their dream a reality.

This year, the Foundation awarded 45 scholarships ranging from $1,000 to $3,000, for a total of $95,000 to these college students:

<table>
<thead>
<tr>
<th>Name</th>
<th>School</th>
<th>Scholarship/Endowment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ayde Alvarado</td>
<td>Warner Pacific College</td>
<td>Maginnis &amp; Carey LLP Scholarship</td>
</tr>
<tr>
<td>Christina Brooks</td>
<td>Western Oregon University</td>
<td>Lynne M. Angland Memorial Scholarship</td>
</tr>
<tr>
<td>Patrick Caudle</td>
<td>Portland State University</td>
<td>Grant Thornton LLP Scholarship</td>
</tr>
<tr>
<td>Katherine Cooke</td>
<td>University of Portland</td>
<td>Perkins &amp; Co. Scholarship</td>
</tr>
<tr>
<td>Ashley Crabtree</td>
<td>George Fox University</td>
<td>OSCPA Educational Foundation Scholarship</td>
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<tr>
<td>Shava Cramer</td>
<td>Portland State University</td>
<td>Deloitte LLP Scholarship</td>
</tr>
<tr>
<td>Jakob Daniels</td>
<td>Oregon State University</td>
<td>OSCPA Educational Foundation Scholarship</td>
</tr>
<tr>
<td>McKenzie Ervin</td>
<td>University of Portland</td>
<td>Expedition100 OSCPA Educational Foundation Scholarship</td>
</tr>
<tr>
<td>Audrey Goodrich</td>
<td>University of Oregon</td>
<td>John &amp; Catherine Knox Accounting Scholarship</td>
</tr>
<tr>
<td>Wilson Guo</td>
<td>Portland State University</td>
<td>OSCPA Educational Foundation Scholarship</td>
</tr>
<tr>
<td>Annabel Guptill</td>
<td>Corban University</td>
<td>Grove Mueller &amp; Swank PC Scholarship</td>
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<tr>
<td>Jordan Hamada</td>
<td>University of Oregon</td>
<td>PricewaterhouseCoopers LLP Scholarship</td>
</tr>
<tr>
<td>Joshua Hight</td>
<td>Linfield College</td>
<td>Delap LLP Scholarship</td>
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<td>Suwadu Jallow</td>
<td>Portland State University</td>
<td>Geffen Mesher Scholarship</td>
</tr>
<tr>
<td>Jacob Johnson</td>
<td>Washington State University-Vancouver</td>
<td>Stephen P. &amp; Mayno Blanding Endowment Scholarship</td>
</tr>
<tr>
<td>Dana Karam</td>
<td>University of Oregon</td>
<td>John &amp; Catherine Knox Accounting Scholarship</td>
</tr>
<tr>
<td>Tyler Kelsch</td>
<td>Linfield College</td>
<td>Boldt Carlisle + Smith LLC Scholarship</td>
</tr>
<tr>
<td>Brandon Kerr</td>
<td>Oregon State University</td>
<td>Suzanne P. McGrath Endowment Scholarship</td>
</tr>
<tr>
<td>Malena Kester</td>
<td>University of Oregon</td>
<td>John &amp; Catherine Knox Accounting Scholarship</td>
</tr>
<tr>
<td>Nathaniel Lynn</td>
<td>University of Oregon</td>
<td>PricewaterhouseCoopers LLP Scholarship</td>
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<tr>
<td>Jennifer Mick</td>
<td>Portland State University</td>
<td>Pauly Rogers &amp; Co. PC Scholarship</td>
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<td>Cody Miller</td>
<td>University of Oregon</td>
<td>Jones &amp; Roth PC Scholarship</td>
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<td>Jessica Mousel</td>
<td>Western Oregon University</td>
<td>Kuenzi &amp; Company LLC Scholarship</td>
</tr>
<tr>
<td>Chase Meyers</td>
<td>Linfield College</td>
<td>DiLorenzo &amp; Company LLC and OSCPA Educational Foundation Scholarship</td>
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<tr>
<td>Allison Mueller</td>
<td>University of Portland</td>
<td>Hansen Hunter &amp; Company PC Scholarship</td>
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<tr>
<td>Adrian Ochoa-Garibay</td>
<td>Oregon State University</td>
<td>Deloitte LLP Scholarship</td>
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<td>Yosiel Ornelas</td>
<td>Oregon State University</td>
<td>Talbot Korbola &amp; Warwick LLP Scholarship</td>
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<td>Cole Peterson</td>
<td>University of Oregon</td>
<td>OSCPA Educational Foundation Scholarship</td>
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<td>Justin Roach</td>
<td>Oregon State University</td>
<td>Allten Sakai &amp; Company LLP Scholarship</td>
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<td>Jorge Salazar-Romero</td>
<td>Oregon State University</td>
<td>Deloitte LLP Scholarship</td>
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<tr>
<td>Eliot Schvaneveldt</td>
<td>University of Oregon</td>
<td>John &amp; Catherine Knox Accounting Scholarship</td>
</tr>
<tr>
<td>Kristen Sisco</td>
<td>Portland State University</td>
<td>OSCPA Educational Foundation Scholarship</td>
</tr>
</tbody>
</table>

“Thank you so much for the Expedition100 OSCPA Educational Foundation scholarship. I am not only honored to receive this scholarship but was excited to learn that I’m the first recipient of the Expedition100 scholarship. This scholarship will help fund my senior year at the University of Portland, where I will complete my BBA in Accounting and a minor in music. This summer, I will be working as an intern at Ernst & Young LLP as my first step in becoming an Oregon CPA. Thank you so much for supporting my education.”

McKenzie Ervin
University of Portland
2017-18 Scholarship Recipient
Jerry Song  
University of Oregon  
Grant Thornton LLP Scholarship

Nicholas Stevens  
University of Oregon  
Jones & Roth PC Scholarship

Alex Sudeora  
University of Oregon  
Anna L. May 5th Year Endowment Scholarship

Morgan Thomson  
University of Oregon  
PricewaterhouseCoopers LLP Scholarship

Samantha Tucker  
Oregon State University  
PricewaterhouseCoopers LLP (pro-bono) Scholarship

Tuan Vuong  
Portland State University  
Isler Northwest LLC Scholarship

Yazhe Wang  
University of Oregon  
Perkins & Co. Scholarship

Madison Welch  
Concordia University  
OSCPA Educational Foundation Scholarship

Kenneth Whitbey  
Oregon State University  
Moss Adams LLP Scholarship

Emily Wilkinson  
Oregon State University  
Jones & Roth PC Scholarship

Cade Windell  
Oregon State University  
KS&Co. Scholarship

Ivy Wong  
Portland State University  
McDonald Jacobs PC Scholarship

Qianru Zhang  
Oregon State University  
Grant Thornton LLP Scholarship

Chase Meyers  
Linfield College  
2017-18 Scholarship Recipient

“I am very thankful for being awarded a scholarship from The OSCP A Educational Foundation. I appreciate that you took an interest in me and have given me this opportunity. I’m looking forward to starting my career as a CPA and one day paying it forward!”

Kristen Sisco  
Portland State University  
2017-18 Scholarship Recipient

“I send my deepest gratitude to The OSCP A Educational Foundation for my scholarship. I am beyond honored and grateful for this generous investment in my future. This scholarship will help to minimize the financial hardship resulting from my pursuit of a master’s degree in taxation. It will help to ensure a bright future for myself in the public accounting profession.”
Investing in the Profession

Your contributions make it possible for Oregon accounting students to achieve their dreams.

**OSCPA Educational Foundation Contribution Options**

- Named $2,000 (or more)
- Diamond $1,000 – $1,999
- Platinum $500 – $999
- Gold $250 – $499
- Expedition100* – $100
- Silver $100 – $249
- Bronze $50 – $99
- Other – up to $50

All contributions, whether one-time donation or through a sustained planned giving option, benefit future CPAs with scholarship monies awarded to worthy Oregon students.

* For every 20 members who contribute $100 to the Expedition100 scholarship fund, a $2,000 college scholarship will be awarded.

**Make your Contribution today at:**
orcpa.org/ed-foundation/contribute.

“I have enjoyed my career as a CPA and am grateful to belong to such an outstanding profession. I contribute to The OSCP A Educational Foundation to help accounting students be able to complete their education and join the CPA profession. Our profession is kept vibrant as each new CPA joins.”

Paula J. Palmer, CPA
Paula J. Palmer CPA LLC, Portland

“I believe education remains the most accessible path to a better life, regardless of the background you bring into it. CPAs should be doing everything we can to encourage and enable those who wish to enter into the study and practice of accounting.”

Janice Romano, CPA
Romano PC, Beaverton
Creating a Legacy

Your partnership with The OSCPA Educational Foundation helps ensure the success of the profession for future generations.

Endowment Funds
Endowments help secure the Foundation’s future, and they are a great option for those who wish to support the profession through planned giving. Contributions can be directed to these endowment funds at any time, or new endowment funds may be established (minimum $50,000).

Established Endowment Funds
• Lynne M. Angland Memorial Endowment
• Stephen P. & Mayno Blanding Endowment
• Myron J. Fleck Endowment
• James B. Gaffney Endowment
• Robert L. Gantenbein Memorial Endowment
• Randell C. Guyer & Son Endowment
• Robert F. Isler Memorial Endowment
• Raymond & Marilyn Johnson Endowment
• Anna L. May Endowment
• Anna L. May 5th Year Endowment
• Suzanne P. McGrath Endowment
• Melvin T. Nygaard Endowment
• Jan Ellen Pailthorp Endowment
• Alan L. Steiger Endowment
• Donald L. Tang Endowment

Planned Giving is a Planned Future
orcpa.org/ed-foundation/planned-giving

Consider one or more of these options:
• General Fund and Named Contributions
• Endowment Funds – create your own or contribute to an established fund
• Retirement Funds
• Estates
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• Life Insurance
• Gift Annuities
• Charitable Trusts

Learn More and Contribute Today!
To learn more about how to include The OSCPA Educational Foundation in your planned giving strategies, contact Phyllis Barker at 503-597-5472 / 800-255-1470, ext. 127; pbarker@orcpa.org.
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Thank You for Making Dreams Come True!

The OSCPA Educational Foundation
in affiliation with the Oregon Society of CPAs
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