



Columbia River MOAA Foundation
(CRMF)
2023
Annual Meeting



ADMINISTRATIVE

- Call to Order
- Ascertain Quorum
- Minutes of Jan 20, 2022 Annual Meeting

AGENDA

- President's Remarks
- Treasurer's Reports
- Q & A

2022 in Review

Thank YOU

for your generosity—

especially for your response to
dues letter, Fall Appeal, and EOY
donations

Columbia River MOAA Foundation (CRMF)

- IRC 501©3 public nonprofit created in 2015 (7^h Anniversary Aug 2022)
 - EIN 47-4776049
- Registered and Incorporated with WA Secy of State
 - Public non profit charity
 - UBI 603 236 781
- Set up as subsidiary of the Columbia River Chapter
 - Operates as a separate & distinct corporation from the parent
 - Both CRC & CRMF boards must agree on all disbursements

2022 Review

- Your donations go farther
 - \$0 Admin fees
 - CRC pays admin costs—
 - So, 100% of your donation goes to Scholarships or STT funds

2022 Review

- 2022 regulatory reports timely filed:
 - IRS: Form 990N
 - WA OSOS (WA legis changes--paper filing!)
 - Annual Report—Lists Board Members
 - Charities Nonprofit Renewal (Financials)

2022 Review

- Continued our scholarships
- Made matching gift
- Increased STT receipts

2022 Review

- Vanguard Brokerage account
 - Opened in 2020 so donors can transfer appreciated securities held long term—for tax benefits
 - NO fees or costs to CRC or CRMF
 - Contact me for account # and DTC code
 - Only rec'd one stock donation to date—easy process

2023 Looking Ahead

- Scholarships:

- Continue scholarship support of Clark & WSU-V
 - Increase # or \$ at Clark???
- Continue matches and grow endowment(s)
- Fall Appeal (return greater than BBQ in person)

2023 Looking Ahead

- STT

- Continue \$ to JROTC including MOAA medals
- Focus on needs of local veterans / organizations

2023 Looking Ahead

Ways to donate (consult your tax advisor)

1. Cash/ check at events/ via mail
2. Link Fred Meyer Rewards card
3. Ending soon: Shop ~~Shop~~ www.Smile.Amazon.com
4. Possible new IRS rulings?

2023 Looking Ahead

More ways to donate (consult your tax advisor)

5. QCD from your IRA accounts still popular

Reduces your AGI on front side of 1040

6. Bequests from your estate

7. Appreciated stock held long term transferred directly to CRMF Vanguard account

- Benefits: No fees to CRMF & donor avoids Capital Gains

C	O	L	U	M	B	I	A							
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M	I	L	I	T	A	R	Y							
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Treasurer's Reports



Questions ?