



IDA TAX ADVANTAGES

Pay your state taxes with appreciated stocks.

STATE TAX CREDIT

75% of the gift qualifies for an Oregon income tax credit.

USE NOW OR ROLL OVER

Credits can be rolled over for up to three years.



ON THE COVER: With help from IDA funds and Habitat for Humanity, the Matthews were able to literally help build their very first home.

Neighborhood Partnerships

Give to Neighborhood Partnerships.
Get back a 75% tax credit.

75% OREGON TAX CREDIT

Imagine:

Your client gets a \$750 state tax credit when they make a \$1,000 charitable contribution.



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Give Back. Get Back.

It's simple: donors can claim 75% of their cash or stock gifts as a tax credit on their Oregon State return, or roll it over for up to three years.

In these uncertain times, businesses and individuals are turning to their tax and financial advisors more than ever before. They want answers on how to structure their wealth and on how to give back to others who are struggling even more.

Neighborhood Partnerships has the solution.

A charitable contribution to Neighborhood Partnerships - an Oregon 501 (c) (3) - lowers your client's tax burden at the same time it helps lower-income Oregonians fund their education, purchase a home, or launch a small business.

Get Results From Your Contribution

Over the past seven years, IDAs have helped 1,819 Oregonians achieve their dreams.

- 822 are seeking to purchase their first-home
- 622 are starting/expanding a small business
- 343 are pursuing post-secondary education
- 805 account holders have completed all program requirements and purchased their designated asset



Meet a Graduate

SHANE TRACEY
NEDCO, CASA Partner,
Eugene OR

Shane Tracey's move to Oregon from Arizona was bittersweet. Though he and his wife loved the area, his plans for culinary

school were dashed when he found the tuition too high. Shane went to work for a bakery, where he continued to educate himself.

When the couple decided to open a dessert and wine bar, they turned for help to the Neighborhood Economic Development Organization (NEDCO), a local organization. The pair started with a \$125,000 budget for the property's build-out. "We narrowed it to \$50,000," laughs Shane. Through their IDA the young entrepreneurs saved nearly \$1,700, which the initiative matched with nearly \$5,000. When you're trying to start a business with little or no money of your own, every little bit helps." The funds went toward the purchase of equipment.

The business owner said that the training he received not only opened the doors to his company, but applies to his daily life as well. The business and budgeting classes were helpful, and he's encouraging other aspiring business owners to enroll in the program too.

For now, life is sweet for this chocolate-making family.

Contribute Today. It's Easy:

1 Download and print the contribution form from our web site ida.neighborhoodpartnerships.org

2 Mail or fax the form to:

Neighborhood Partnerships
1020 SW Taylor, Suite 680
Portland, OR 97205

FAX : 503.226.3027

The amount of IDA tax credits available per year is limited. Act now!

Neighborhood Partnerships will accept contributions until the credit has been fully utilized. Any contribution received after the credit is fully utilized, or December 31, 2009, will be returned.

Please check current IDA Tax Credit availability on our web site ida.neighborhoodpartnerships.org.

Contributions up to \$100,000 per tax return can be made via check, stocks or mutual funds. You will receive acknowledgement of your contribution within 10 days, along with instructions on applying the IDA Tax Credit to your State of Oregon taxes.

PLEASE NOTE: Tax issues are very complicated and vary on a case by case basis. To determine any additional tax benefits, please consult your tax or financial advisors. This information is not intended to offer nor held out as offering tax or investment advice to any individual or business. You should consult your tax and financial advisors before committing funds to the IDA Initiative or any other tax credit program.

ida.neighborhoodpartnerships.org