

Turning Required Distributions Into Meaningful Impact

For many supporters of Heritage University, charitable giving is an important part of their legacy. One option that can benefit both donors and the causes they care about is a Qualified Charitable Distribution (QCD)—a way to make a gift directly from an Individual Retirement Account (IRA) while potentially lowering taxable income. For donors who are planning their retirement strategies, QCDs can offer a meaningful opportunity to support the institutions and missions that have been important in their lives.

A QCD allows individuals to transfer funds from their IRA directly to an eligible nonprofit organization, such as Heritage University. Unlike a typical IRA withdrawal, which is generally counted as taxable income, a qualified charitable distribution is excluded from the donor's taxable income.

For retirees who must take required minimum distributions (RMDs) from their IRAs each year, a QCD can be especially useful. By directing some or all of that required withdrawal to a charity, donors can satisfy their RMD while supporting organizations they value.

To qualify, the IRA owner must be at least age 70½ when the distribution is made. For 2026, individuals may distribute up to \$111,000 per year as a QCD. Married couples filing jointly may each donate up to that amount from their own IRAs.

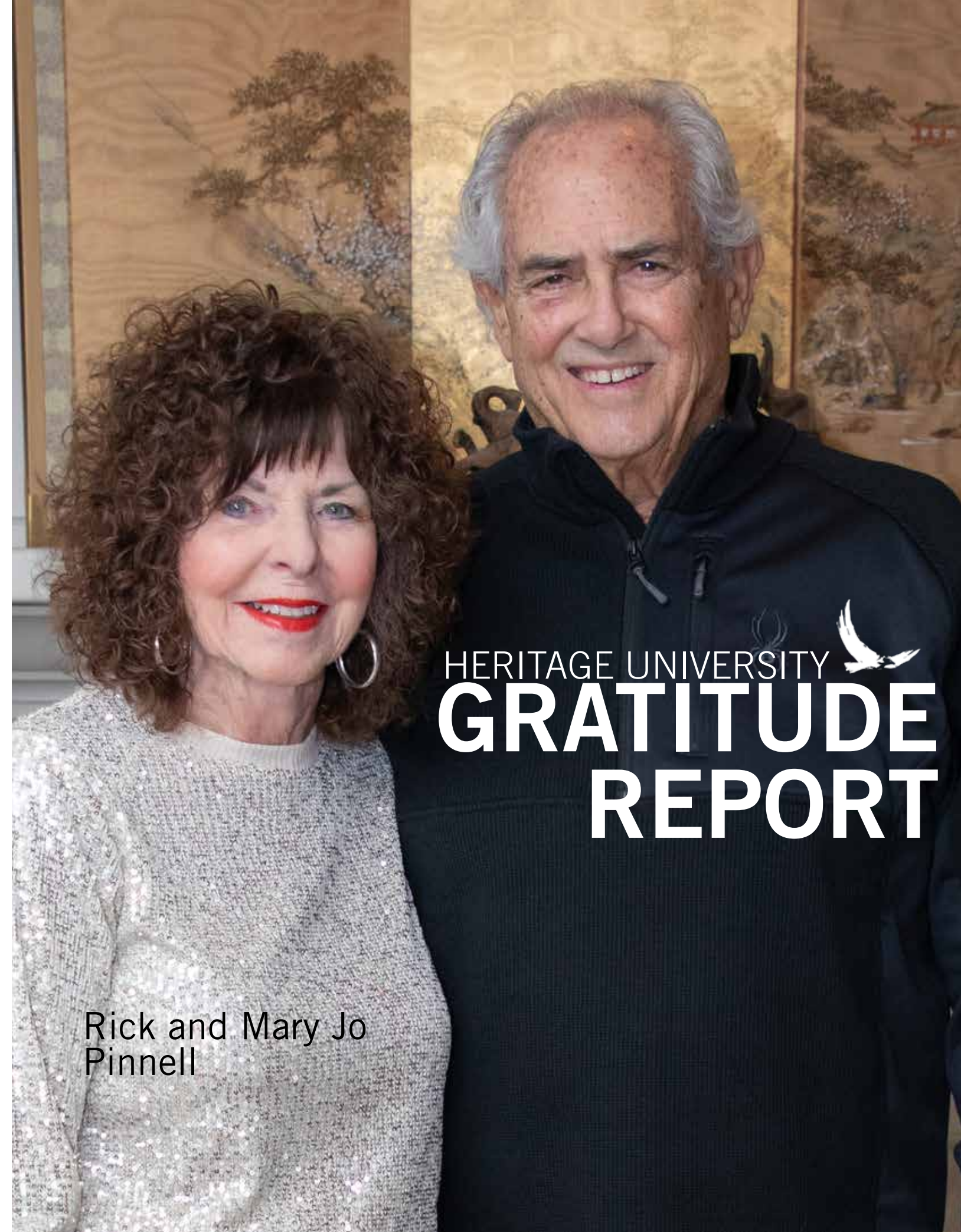
There are several important rules to keep in mind. The distribution must be made directly from the IRA to the charitable organization—the funds cannot first be withdrawn by the donor and then donated later. QCDs may be made only from traditional IRAs or inherited traditional IRAs, and the receiving organization must be an eligible public charity.

Although QCDs are not taxed as income, they cannot also be claimed as a charitable deduction. Even so, many donors find the strategy beneficial because lowering taxable income may reduce overall tax liability.

QCDs must be completed by December 31 to count toward that year's required minimum distribution. Donors should consult a tax advisor or financial professional to determine whether this giving option is appropriate for their circumstances.

For those already planning charitable gifts, a qualified charitable distribution can be a simple and effective way to support Heritage's mission while aligning philanthropy with retirement planning and creating a lasting impact for future generations of students.

Donors interested in learning more about Qualified Charitable Distributions or other planned giving opportunities are encouraged to contact their personal financial advisor, or the Heritage University Advancement Office, where staff can help answer questions and provide additional information about giving options that support Heritage students and programs. 



HERITAGE UNIVERSITY GRATITUDE REPORT

Rick and Mary Jo
Pinnell

Our Mission

Heritage University empowers a multi-cultural and inclusive student body to overcome the social, cultural, economic and geographic barriers that limit access to higher education. Rooted in the homeland of the Yakama Nation, we embrace transformational student-centered education that cultivates leadership and a commitment to the promotion of a more just society.



From the **PRESIDENT**

Seldom, if ever, have I had the privilege of being an ambassador for an institution that is truly one of a kind. The word “unique” is one of the most overused words in our language, but when it is truly accurate, it is also one of the most important words.

As the only private university in the nation that is simultaneously federally designated as a Native American-Serving Nontribal Institution and a Hispanic-Serving Institution, there is none other like us. During my installation as Heritage’s fourth president last November, I coined the phrase “America’s Essential University” to describe Heritage. That’s a mighty big claim, but I believe we live into it. Based on your transformational and ongoing generosity to this beloved institution, it seems that you agree.

The Gratitude Report opens with two of the many dear friends we have made in this community. Before we even arrived in Washington, Rick and Mary Jo Pinnell were already reaching out to welcome us and to pave the way for a smooth transition. It was quick and easy to call them true friends, and they continue to open so many doors for my family and for this university they both dearly love.

My grandmother taught me the power of gratitude, not just as a hollow word, but the real thing, that deep-down feeling that makes us truly thankful even beyond our ability to fully express the emotion. That is how I feel, that is how Heritage University feels, about all of you.

Thanks, Rick and Mary Jo, and thanks to each of you for your continuing gifts, financial and humanitarian, tangible and less tangible. They make it possible for our essential mission to continue.

A handwritten signature in black ink that reads "Chris Tiller". The signature is stylized with a large "C" and a long, sweeping underline.

RICK AND MARY JO PINNELL

Rooted in Community

For Rick and Mary Jo Pinnell, generosity did not begin with a single gift. It grew from example, lived experience, and a deep belief in community. Long before Rick served 19 years on the Heritage University Board of Directors — and before the couple became involved in nearly every aspect of the university’s fundraising efforts — the values guiding their philanthropy were already firmly rooted.

Rick traces much of that foundation to his parents, George and Joan Pinnell. It was his mother who first connected him to Heritage and encouraged his involvement, but the story goes back even further. Rick’s father arrived in the Yakima Valley at age 16 with his family during the Dust Bowl, part of the wave of “Okies” who left the Plains in search of work. Like many newcomers, George began as a migrant laborer in the orchards.

When not working in the orchards, George helped his father start a small office equipment business. What began as a modest venture grew alongside the Valley itself, built on principles of hard work, reliability, and service to neighbors. The company became a lasting family enterprise — one that George later passed to Rick, who operated it until his retirement.

Rick grew up immersed in these lessons of diligence, gratitude, and belonging. He watched his parents serve on civic boards and step forward whenever help was needed. The mid-1900s, he recalls, were both difficult and deeply communal, with people from many cultures working side by side, united by necessity and shared purpose.

“When I worked in the orchards in high school, my foremen were all Okies who came to the Valley about the same time as Dad,” Rick said.



Those early lessons were reinforced during Rick’s military service. During the Vietnam War, he served as a platoon leader and later, stateside, as executive officer (XO) of his company at Fort Meade, Maryland.

“This was another life lesson,” Rick said. “I was working with people from all backgrounds during very challenging times.”

Rick reflected on how the lessons he learned from his parents and those he learned through firsthand experience shaped his views.

“I think our mutual life experiences built our understanding of the importance of hard work, dignity, gratitude, belonging, and a deep respect for our fellow man.”

Mary Jo’s path to Yakima added another dimension to their shared commitment. Before moving to the Valley, she spent more than 40 years as a flight attendant with United Airlines, traveling internationally and experiencing diverse cultures and communities around the world. She saw firsthand the realities of extreme poverty. Her experiences shaped her reverence for different cultures and her appreciation for the profound difference education can make in enhancing opportunity.

After marrying Rick 52 years ago and moving to Yakima, Mary Jo built her own roots in the Valley through volunteerism. She served on several nonprofit boards, including the YMCA, Yakima

Tennis Club, and Humane Society, and was active with Junior League, forming connections that strengthened her ties to the community.

Together, the Pinnells believe strong communities are built when people are engaged and united by shared values. Rick often expresses pride in the Yakima Valley for rallying to build not one but two higher education institutions — an achievement few communities of its size can claim.

“What a great opportunity we have provided for our Valley’s students,” he said.

Rick is also proud of the Yakima Valley’s increasing diversity. “Change is good,” he said, acknowledging that progress can bring challenges but what matters is the shared commitment to moving forward, he said.

The couple’s passion for Heritage is rooted in the university’s ability to reach students who, for economic, cultural, and family reasons, might otherwise be overlooked. Rick is candid that although he was not a strong student himself (though he loved his time at Washington State University), he understood that education is a vital pathway to greater opportunity. He and Mary Jo both see Heritage as an institution that recognizes that not everyone arrives fully prepared, nor learns the same way. The university meets students where they are, offering support systems that help them overcome academic and personal hurdles.



“The small classes and professors who teach and mentor their students are key to so many students’ success,” he said.

Rick and Mary Jo are impressed by the work ethic of Heritage students. Many balance classes with jobs and family responsibilities; many are first-generation college students. Their resilience, determination, and appreciation for opportunity are qualities Rick believes are invaluable both in school and in the workplace.

“These are the kinds of people businesses need,” he said. “They know how to work hard, overcome obstacles, and collaborate with people from different backgrounds. Those characteristics aren’t taught — they’re experienced.”

The Pinnells’ commitment to service extends well beyond Heritage. Rick has chaired the boards of the Yakima YMCA, Yakima Rotary Club, Yakima Rotary Trust, and Yakima YMCA Trust, and has served on the boards of Yakima Valley Bank, the American Red Cross, Providence Hospital, and numerous business associations. Together, Rick and Mary Jo have consistently sought to strengthen the institutions that shape their community.

“We feel so blessed,” Rick said, “to be part of this community and to serve alongside it.”

For the couple, supporting Heritage is not simply an act of generosity. It is an expression of faith — in education, in hard work, and in the enduring power of a community that believes in its people.



2025 Donor Honor Roll

JANUARY 1, 2025–DECEMBER 31, 2025

Heritage University students bring talent, determination, and ambition to their studies, yet for many the opportunity to attend college would not be possible without the generosity of our donors. We are deeply grateful to the individuals, organizations, and businesses who partner with us to transform lives and strengthen communities through education. Thank you for making this work possible.

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Lori and Jonathan Alvord
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Patrice and John Cornelius

LISA OLNEY

SOPHOMORE, BUSINESS ADMINISTRATION

Full Circle Scholarship
Johnson Scholarship Foundation

Lisa, an enrolled member of the Yakama Nation and mother of two, returned to school through Heritage’s HEP program and is now pursuing a business degree to bring greater opportunity and resources to her White Swan community.



Jaime Cortes
Cougar Den
Susie Crawford
Bernadette and Bob Crider
Alice Cunningham
Karen Cunningham
Kyle Curtis and Bernie Trujillo
David Dahlin

We do our best to ensure the accuracy of the information contained within the Gratitude Report. Please let us know if we have inadvertently left your name out of our listing.

Alumni *Deceased

Aaron and Quinn Dalan
Ted and Barbara Daniels
Francis and Rosemary Davis
Jason Davis 🦋
Chapin and Janet Day



AMARILIS
SANTIAGO

SENIOR, NURSING

Sea-Mar Scholarship
Washington Apple Education
Foundation Scholarship
Angel Fund
Richard and Patricia Twiss
Scholarship

Amarilis, a dedicated
mother and McNair
Scholar, is pursuing
a nursing degree with
the goal of improving
healthcare access and
connecting underserved
communities to vital
resources.

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ABRAHAM
SILVA
HERRERA

SENIOR

BUSINESS ADMINISTRATION
HU EXCELLENCE
TRIO
OIC OF WASHINGTON
CAMP

Abraham has a passion
for creativity that he
plans to turn into a
career in marketing.
He looks forward to
being part of a team
developing advertising
and promotional
campaigns and,
ultimately, wants to be
a CEO.



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Bree Black Horse
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Pamela Root
John and Patricia Rose



ELIZABETH LOPEZ

JUNIOR SOCIAL WORK
MOCCASIN LAKE SCHOLARSHIP

Elizabeth is a first generation student from Moxee who always wanted to be a social worker. Her goal is to earn her master's degree and work with children and families in the foster care or adoption systems.

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Marco Yolo 🦋
Cheryl Young
Thomas Zeilman and Rebecca Pennell
Matthew Zuckerman

🦋 Alumni

THE HERITAGE SOCIETY

Members of The Heritage Society have demonstrated extraordinary generosity through lifetime contributions of \$100,000 or more. We are deeply grateful for their steadfast commitment to our mission and to the success of our students.

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Yakima Valley Community Foundation
Yakima Valley Farm Workers Clinic

MEMORIAL and HONOR GIFTS

Gifts made in honor or memory of special individuals offer a meaningful and lasting way to recognize the lives, relationships, and contributions that have touched our community.

IN MEMORY OF

Laura G. Aguiar-Garibay
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Endowed funds build a legacy of support that lasts for generations. These can be named and directed to support students in a manner that best meets your individual giving goals, such as scholarship support or establishing a faculty chair. Thank you to all of our generous supporters who have established and contributed to these funds since Heritage’s founding.

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The Sister Kathleen Ross, SNJM

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Named in honor of Heritage University’s founding president, the Sister Kathleen Ross, SNJM Legacy Giving Circle includes the generous supporters who have included Heritage in their estate plans. Thank you for helping ensure that quality higher education remains accessible for generations to come.

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A LEGACY OF GENEROSITY

Scholarship Dinner Marks Its 40th Anniversary

What began as a modest fundraising dinner with a goal of raising \$5,000 has grown into Heritage University's most powerful engine for student opportunity.

This year marks the 40th anniversary of the Bounty of the Valley Scholarship Dinner, a tradition that has helped generations of students achieve the dream of a college degree. Over the past four decades, the event has raised \$9,655,498 through 6,143 gifts, all dedicated to supporting Heritage students.

The story of Scholarship Dinner began with a small group of volunteers and a big idea. Among them was longtime Heritage supporter and former board member Virginia Hislop, who helped plan the very first dinner.

"I asked them how much they wanted to raise and was told, '\$5,000 would be nice,'" Hislop recalled. "I said, 'I think we can do better than that!'"

They did, and more. The first Scholarship Dinner raised \$35,000—seven times the original goal—and launched a tradition that has continued every year since. Hislop herself has attended every Scholarship Dinner in the decades that followed, witnessing firsthand how the event has grown in scale and impact.

Today, Scholarship Dinner stands as the university's largest annual fundraising event, bringing together community leaders, alumni, students, and supporters who believe in the transformative power of higher education.

Funds raised through the event provide scholarships that help students—many of whom are the first in their families to attend college—pursue degrees and build brighter futures for themselves and their communities.

"Scholarship Dinner is one of the most powerful expressions of community support for our students," said David Wise, senior vice president for Advancement. "Every gift represents someone saying, 'We believe in you and your future,' and that belief can be life-changing for students who might otherwise think college is out of reach."

Recent years have seen the event reach new heights. In 2025, the dinner set a new record, raising \$1,297,744, surpassing the previous year's milestone of more than \$1.1 million. Even during the challenges of the COVID-19 pandemic, supporters rallied around Heritage students, helping the event reach record-

breaking totals through innovative virtual gatherings and expanded participation.

For Wise, the anniversary is as much about the community behind the event as it is about the dollars raised.

"Forty years of Scholarship Dinner is really forty years of community members stepping forward to invest in the potential of our students," he said. "The generosity shown year after year is extraordinary and has helped thousands of students achieve dreams that once felt impossible."

The heart of Scholarship Dinner has remained the same since that first evening: the belief that when a community comes together to invest in students, lives are transformed.

Over the decades, donors, volunteers, and friends of Heritage University have proven that belief true—one paddle raise, one scholarship, and one student success story at a time. 🦋



HERITAGE

BY THE

NUMBERS

97%

Undergraduates who receive grant and/or scholarship aid

88%

Students who attend Heritage full-time

84%

Students who work at least part time

81%

Students who are the first in their families to attend college

75%

FEMALE

25%

MALE

72%

HISPANIC

17%

NATIVE AMERICAN

9%

WHITE

2%

TWO OR MORE RACES

>1%

BLACK OR AFRICAN AMERICAN

>1%

ASIAN

ENROLLMENT

FALL 2025

801 Undergraduates

167 Graduates

OUR CAMPUSES

TOPPENISH CAMPUS

Located on 48 acres in Toppenish, Washington on the Yakama Reservation

KENNEWICK CAMPUS

12,292 square foot office and classroom space at 333 West Canal Drive, Kennewick, Washington

REGIONAL SITE

Columbia Basin College campus in Pasco, Washington

Heritage offers 37 undergraduate and graduate degree programs in areas with promising job growth.

UNDERGRAD MAJORS

- American Indian Studies
- Accounting
- Biology
- Business Administration
- Computer Sciences
- Criminal Justice
- Education
- English
- Environmental Science/Studies
- History
- Mathematics
- Nursing
- Psychology
- Social Work
- Visual Arts

GRADUATE MAJORS

- Master of Arts in Mental Health Counseling
- Master of Arts in Multicultural English Literature and Language
- Master of Arts in Education in Educational Administration
- Master in Teaching
- Master of Social Work

OUR FACULTY

57

Full-Time Faculty

9:1

Average student to faculty class size

POWERED BY PARTNERSHIPS

Sustainable projects moving forward at Heritage thanks to funding from government and private grants.

Support for Heritage University comes from many sources. While generous gifts from alumni, individuals, and businesses play an essential role in advancing the university's mission, grant funding from government agencies and charitable foundations is equally important. These investments help Heritage pursue major projects that might otherwise be out of reach—such as becoming a more environmentally sustainable campus.

This spring, Heritage is taking steps toward reaching that goal thanks to the support of several public and philanthropic partners who are helping fund major energy and infrastructure improvements on the Toppenish campus.

Through investments from the Washington State Department of Commerce, Yakima County, the M.J. Murdock Charitable Trust, and state and local leaders, Heritage is moving forward with projects designed to improve environmental stewardship, strengthen campus resilience, and support the university's long-term growth.

Among the most significant projects is the construction of a new \$3.5 million wastewater treatment plant on the Toppenish campus. Scheduled to break ground this spring, the modern facility will improve how wastewater is treated and managed while helping the university responsibly steward one of the Yakima Valley's most valuable natural resources—water.

"This project reflects what can happen when public agencies and community partners come together around a shared vision," said David Wise, vice president of advancement at Heritage University. "We're incredibly grateful to the Washington State Department of Commerce, Yakima County, the M.J. Murdock Charitable Trust, and the state and local leaders who helped make these investments possible."

The upgraded system will also provide the capacity needed to support future campus expansion. Located on the southwest corner of campus, the project is expected to take approximately nine months to complete.

We're deeply appreciative of the agencies and partners who recognize the importance of investing in sustainable infrastructure.

In addition to this infrastructure investment, Heritage has also been awarded two Clean Energy Grants through the Climate Commitment Act as part of the Energy Programs in Communities (EPIC) administered by the Washington State Department of Commerce.

The first grant—\$1,030,000 for solar and battery storage—will fund the installation of solar panels on three Heritage buildings, along with a new battery storage facility. The system will generate renewable electricity and allow the university to store energy for use during peak demand or outages.

The solar panels will be installed on the south and west-facing roofs of buildings so as to maximize solar efficiency.

The grant also includes \$60,000 for student internships and community outreach, giving students opportunities for hands-on learning in renewable energy systems while sharing information about solar power and clean energy alternatives with the broader community.

A second grant will support technical assistance services, including a comprehensive feasibility study examining energy needs for existing campus buildings as well as future facilities and infrastructure.

Wise said the projects demonstrate how strategic partnerships can advance both environmental sustainability and student success.

"We're deeply appreciative of the agencies and partners who recognize the importance of investing in sustainable infrastructure," Wise said. "Their support not only helps Heritage reduce its environmental footprint but also strengthens our



Tanks for the new wastewater treatment plant are on site, ready for installation this spring.

ability to serve students and the Yakima Valley community for generations to come."

Moreover, said Wise, the projects will have a significant economic impact for the university. The solar installation alone is expected to save upwards of \$70,000 annually on electricity costs, with those savings redirected to support students facing critical needs such as housing, food, transportation, childcare, and medical services.

The solar energy system will also increase campus resilience by providing backup power during outages, allowing designated buildings to serve as a stable shelter for members of the surrounding community during emergencies.

By combining renewable energy initiatives with critical infrastructure upgrades—and through the partnership of public agencies and philanthropic supporters—Heritage continues to move toward its goal of becoming a more sustainable campus while expanding opportunities for students and the Yakima Valley community. 🌊

Essential to Our Students. Essential to Our Community.

At Heritage University, we are doing everything within our power to ensure that our students can afford to attend college and fulfill their educational dreams.

Recent changes to the Washington College Grant program mean that many Heritage students will receive less financial support from the state than anticipated. Because these grants have long been a cornerstone of college affordability for low-income students, the change creates an unexpected financial gap for many of the young people we serve.

In total, **Heritage University students now face a shortfall of \$1.1 million in the 2026-27 academic year in the financial aid they rely upon to continue their education.**

Heritage is committed to ensuring that no student has to put their education on hold because of circumstances beyond their control. We are reallocating university funds to cover this loss to the degree possible, but our students also need your help. Our goal is simple: to replace these lost funds with scholarships so that every student attending or planning to attend Heritage can remain on the path to graduation.

For many of our students—most of whom are the first in their families to attend college—the dream of earning a degree depends on the scholarships and support systems we are able to provide.

That is why your support is so important right now.

Your generosity will help ensure that Heritage students can continue their studies, pursue their dreams, and graduate prepared to serve their families, communities, and the region we all care about.

Together, we can ensure that financial barriers do not stand between our students and the futures they are working so hard to achieve.

We thank you. Our students thank you.

Make your gift online at
heritage.edu/giving

Or, scan the QR
code to go to
the giving page.



To mail your donation,
complete this form and send
it with your contribution to:

**Heritage University
Office of Advancement
3240 Fort Road
Toppenish, WA 98948**

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This gift is ☐ In honor of ☐ In memory of _____			

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