## WILLAMETTE VALLEY VINEYARDS



"Wines made with consideration for the environment, employees and community simply taste better."

Jim Bernau, Founder/Winegrower





# Building a Dream

Founded in 1983 by Oregon native Jim Bernau with the dream of creating world-class Pinot Noir, Jim cleared away an old pioneer plum orchard in the Salem Hills and watered the vines by hand using 17 lengths of garden hose to get the grapelings through their first summer. Willamette Valley Vineyards has grown from a bold idea into one of the region's leading wineries, earning the title "One of America's Great Pinot Noir Producers" from Wine Enthusiast Magazine.

(Above) Founder and CEO working on the first plantings at the Estate Vineyard in the Salem Hills.

### World-class Wines Through Shared Ownership

Founder and CEO Jim Bernau believes among the healthiest forms of business are those owned by the community. Jim's vision of organizing the support of wine enthusiasts to make world-class wines through shared ownership has resulted in more than 26,000 wine enthusiast owners (NASDAQ: WVVI & WVVIP).

(Below) Winery Owners gather in 2017 to help harvest the Pinot Noir crop from Bernau Estate Vineyard.



### History of Willamette Valley Vineyards

- Founder Jim Bernau began planting Pinot Noir vines in what's now called the Bernau Block at the Estate Vineyard in the Salem Hills.
- 1988 Jim, as a member of the Oregon Governor's Delegation to Burgundy, helped arrange the importation of French Pinot Noir and Chardonnay budwood – the renowned Dijon Clones.
- Became the first successful, community-funded business in the country with a self underwritten Regulation A Public Common Stock offering, extending Ownership to wine enthusiasts.
- The winery began a glass recycling program offering ten cents per bottle for all wine bottles returned to its Tasting Room.
- 1995 Jim's personal gift to Oregon State University established the nation's first professorship of fermentation science.
- The winery became a founding member of LIVE (Low Input 1997 Viticulture and Enology) and Salmon-Safe. Willamette merged with Oregon wine pioneer Bill Fuller's Tualatin Estate Vineyard planted in 1973, one of the oldest and most respected vineyards in Oregon.
- Wines appeared on NBC's hit television show "Friends." and were served at the White House.
- 2007 Upon the O'Briens' retirement in 2007, Elton Vineyard was contracted under a long-term lease. Willamette became the first winery in the world to use sustainable cork stoppers certified by the Rainforest Alliance to Forest Stewardship Council (FSC®) standards.
- 2010 The Oregon Wine Board recognized Jim's early work with the industry's Founder's Award followed by the Governors' Gold Award, presented by Oregon's four living Governors.
- 2014 Jan Bernau, Jim's spouse, lead the project to remodel the Estate Tasting Room, Patio and Courtyard, plus expanded the Barrel Room and added two LEED Gold Winery Suites.
- 2015 Launched an effort to build boutique brands with some of Oregon's most intriguing vineyard sites. To fund the effort, the winery issued a Preferred Stock Offering inviting wine enthusiasts to become part of Oregon's wine future as Winery Owners. To date, brands include Elton in the Eola-Amity Hills, Pambrun in the Walla Walla Valley, Maison Bleue in The Rocks District of Milton-Freewater and Bernau Estate in the Dundee Hills.
- 2018 Started the process to convert the Bernau Estate Vineyard in the Dundee Hills to biodynamic farming practices.
- 2019 Founder Jim Bernau and Justin King of King Estate Winery accepted the Innovator of the Year award at the Wine Enthusiast Wine Star Awards for Oregon Solidarity, a collaboration wine to support Rogue Valley winegrowers whose contracts were abruptly canceled.
- Willamette Wineworks located in Historic Folsom, California, opened as Willamette's first prototype outpost and debuted a Barrel Blending System with Natoma wines.
- 2021 Bravo's Top Chef airs Season 18 finale filmed at our Estate in the Salem Hills, where the cast and crew toast the conclusion with our 2017 Bernau Estate Méthode Traditionnelle Brut.
- Sparkling winery Domaine Willamette in the Dundee Hills and Tasting Room & Restaurants in Lake Oswego, Vancouver and Happy Valley opened this year.









## Our Estate Vineyards

Willamette Valley Vineyards has continued to grow from its original three estate vineyards – the Estate Vineyard, Tualatin Estate and Elton Vineyard – with the addition of Ingram Estate, Bernau Estate, Loeza Vineyard and Jory Claim. All our producing estate vineyards are certified LIVE and Salmon-Safe.



### **Estate Vineyard**

Willamette Valley AVA | Est. 1983

Located south of Salem and planted on the south-facing volcanic flow, the Estate vineyard has 67 acres of vines rising from 500-810 feet in elevation with seven to twelve degree slopes tilted toward the sun. As a result, the vines get excellent air drainage with temperatures approximately 10 degrees cooler than the valley floor during the day. The shallow, rusted red volcanic Nekia and Jory soils at this site are well drained to a depth of two and a half to six feet.



## Tualatin Estate Vineyard Tualatin Hills AVA | Est. 1973

Tualatin Estate Vineyard is one of the oldest and most respected vineyards in Oregon with 171 producing acres. Pinot Noir and Chardonnay from Tualatin took Best of Show for both the red and white categories at the London International Wine Competition, where the award was presented by the Queen at the London International Wine Competition, a feat unduplicated in the competition's history. Covered in Laurelwood soil and Pisolites, the slope is south-facing with an elevation of 250-530 feet.

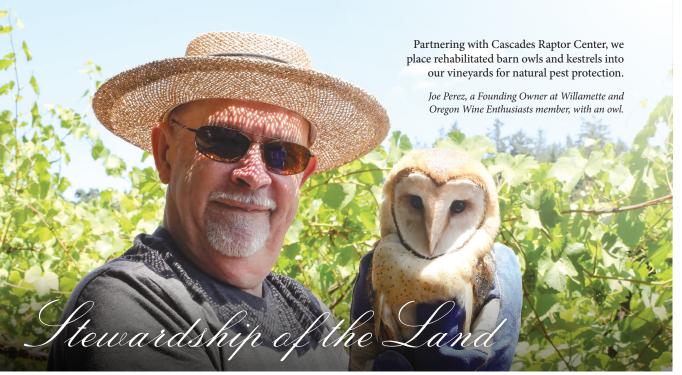


### **Elton Vineyard**

Eola-Amity Hills AVA | Est. 1983

Founded by Dick and Betty O'Brien, the vineyard was planted in 1983 on land inherited from Betty's parents, Elton and Peggy Ingram – hence the vineyard name. Elton Vineyard's producing 54 acres, rising 250-500 feet in elevation, has deep volcanic Jory soil with a top layer of Woodburn sedimentary soil deposited by the cataclysmic Missoula Lake Flood. The vineyard was planted around a white glacial erratic carried from Canada in the flood. Ingram Estate Vineyard was planted above Elton in 2013.





#### LIVE & Salmon-Safe

All of the producing estate vineyards have been certified sustainable through LIVE (Low Input Viticulture and Enology) and Salmon-Safe. Founder Jim Bernau was honored by his fellow winegrowers with LIVE's Founder's Award (right image) for his involvement in creating the first system of environmental stewardship in American agriculture.

#### Wind and Solar Powered

The Estate Vineyard utilizes both wind and solar power. By using wind-powered electricity, we avoid emitting 1,084,102 pounds of CO<sub>2</sub> into the environment each year, and our solar panels prevent 3,560,000 pounds of CO<sub>2</sub> from entering the atmosphere.

#### **Recycling Water**

The winery has a state-of-the-art greywater system allowing us to use significantly less water and filter out organic solids for compost.





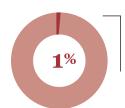


# Authentic Oregon Wines

## Oregon's Leading Producer of Willamette Valley Appellated Pinot Noir

The winery sources all of its barrel-aged Pinot Noir from its estate-grown vineyards and meticulously farms over 500 acres in the hills of the Willamette Valley.

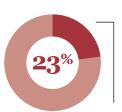
#### Oregon Wine on the Rise



Oregon's share of U.S. wine production

Oregon wines command an average price per bottle of \$17.52, more than two times the category average of \$8.70.

Nielsen Data, Total U.S., 52 weeks ending 1/28/2023



Oregon's share of U.S. wine represented in Wine Spectator's Top 100 wines in 2021

**▶** Willamette Valley Vineyards produces the #1 selling Oregon Pinot Noir above \$20 nationwide.

IRI Data, Total U.S., 52 weeks ending 1/1/2023





#### **Estate Pinot Noir**

Our Estate Pinot Noir expresses the terroir of three of our vineyards — the original planting by Founder Jim Bernau in the Salem Hills, Tualatin Estate planted by Oregon wine pioneer Bill Fuller in the foothills of the Coastal Range and Elton Vineyard planted by Dick and Betty O'Brien on the east face of the Eola-Amity Hills.

## **Certified Vegan Wines**

The Estate Pinot Noir, Whole Cluster® Pinot Noir and Whole Cluster® Rosé of Pinot Noir are all Certified Vegan. This certification means that no animal, dairy or honey bee-derived ingredients are used to make our wines.







Our dedication to Pinot Noir led us to craft a new expression of the varietal without the color. The resulting wine has a creamy texture, rich mid-palate, bright aromas and flavors with refreshing acidity. In 2019, this wine entered into distribution and has seen tremendous success.

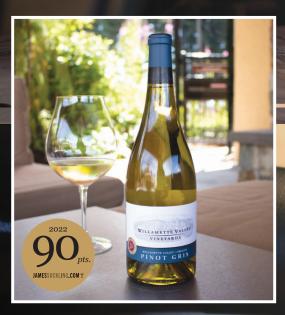


WILLAMETTE VALLEY

WHITE PINOT NOIR

#### **Pinot Gris**

Pinot Gris was first introduced into the United States from France by David Lett, who planted Gris in the North Willamette Valley at The Eyrie Vineyards. Jim received his first cuttings from David. The variety is now Oregon's leading white wine.



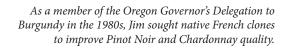
### Golden Coin

In 2020, the Golden Coin program was launched – a Willy Wonka inspired venture where a limited number of coins are placed under the capsules of our wines. Finders can redeem their coin for prizes and select a local food bank to receive a donation from Willamette Valley Vineyards.



#### **The French Connection**

The importation of "Dijon Clones" of Chardonnay into the Willamette Valley was one of the greatest tipping points in Oregon wine quality. The state's original plantings, which were brought up from California by emigrating winemakers, produced fruit that failed to fully ripen in especially cold vintages. The new Dijon Clones ripen two weeks earlier, yielding beautifully balanced wines with ripe flavors and acidity.







### Sustainable Wines and Pacific Northwest-Inspired Food Pairings

Culinary offerings at all our locations are curated to highlight wines from our vineyards. We're bringing the Oregon wine country experience into some of the Northwest's most exciting areas. Enjoy our classic Oregon wines paired with cuisine sourced from the Pacific Northwest in our private dining and event spaces or during one of our Wine Pairing Dinner events.

#### Willamette Wineworks

After successfully launching our first remote tasting room prototype in Folsom, California in 2020, we've expanded into other neighborhoods. Our new Tasting Room & Restaurants bring the winery experience to our guests and offer Willamette Cuisine to pair with our classic Oregon wines.





#### Lake Oswego

Located off Highway 43 in downtown Lake Oswego, this location features food and wine pairings, wine lockers, a beautiful trellis patio with an outdoor fire pit, a private wine cellar dining room and ample parking.



Featuring incredible views of the Columbia River, we are excited to be the first Oregon wine tasting destination in this area. Our Tasting Room & Restaurant includes a barrel blending experience, barrel booth seating and spacious patio seating overlooking the river.

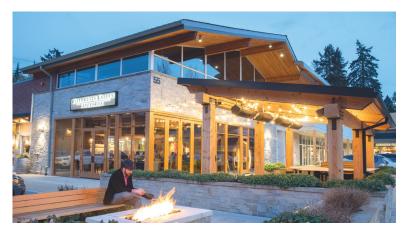


As we join the flourishing town of Happy Valley just outside of Portland, the space features a sophisticated dining room, a granite boulder fire pit and our signature barrel booth seating. Outside offers a large patio and water feature.

#### Bend

Located in historic downtown Bend, our Tasting Room & Restaurant will bring wine country to this destination community that loves all things craft.

Anticipated opening: Late 2023











## Domaine Willamette

### At Bernau Estate Vineyard in the Dundee Hills

Domaine Willamette is Oregon's first sparkling wine facility that produces world-class méthode traditionnelle sparkling wines with an underground aging cellar at the biodynamically-farmed Bernau Estate Vineyard. Opened in 2022, the winery offers Oregon-inspired hospitality with wine and food pairings, stunning views, educational tours and beautiful gardens overlooking the Dundee Hills.

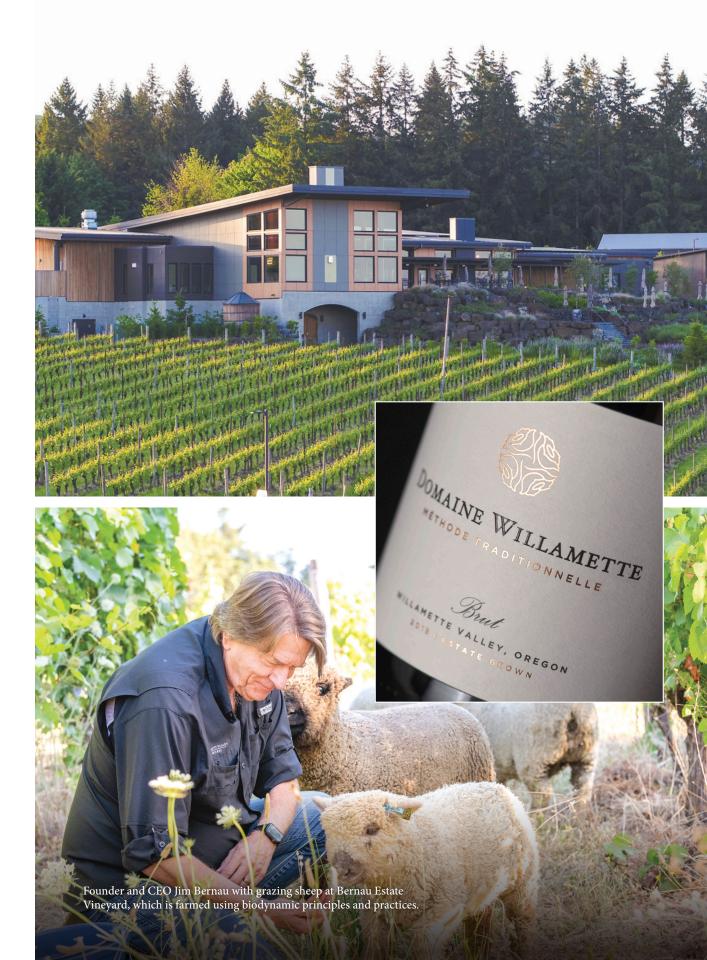
Domaine Willamette is more than a bottle of wine. These wines embody the pursuit of crafting selections from the Willamette Valley of Oregon, that are on par with the best from Champagne. Together we are creating a new standard of sparkling wine. The launch of Domaine Willamette into the wholesale market is planned for an anticipated limited release by spring 2025.

#### Sustainability in Biodynamic Farming

Bernau Estate Vineyard is farmed using biodynamic principles and practices. Aspects of biodynamic farming are represented in the winery's tasting rooms, gardens and artwork. This is a holistic, ecological and ethical way of farming. It involves creating a system that increases the farm's capacity for self-renewal and sustainability.









# Winemaking

In 2023, the winery celebrates its 40th Anniversary since Founder and CEO Jim Bernau started Willamette Valley Vineyards. As Willamette continues to grow, so does its winemaking and vineyard team. The new wines they produce, location openings and educational experiences allow us to continue Willamette's rich winemaking legacy.

Led by Terry Culton, Director of Winemaking & Vineyards, Willamette could not make our award-winning, authentic Oregon wines without the work of those in the vineyards as well as in the cellar. The vineyard and production team produces the highest quality wines year after year. The winery continues to develop its deep portfolio that includes classic Oregon Pinot Noirs as well as sparkling wines made with estate-grown fruit and bold reds from the Rogue Valley AVA and the Walla Walla Valley AVA.



(Above, left to right) Willamette Valley Vineyards Vineyard Manager Efren Loeza, Founder and CEO Jim Bernau with fellow Oregon pioneer winemakers Bill Fuller of Tualatin Estate Vineyard and Betty O'Brien of Elton Vineyard in the cellar sampling Pinot Noir barrels.



## Healthcare Services for Oregon's Vineyard Workers

Willamette Valley Vineyards is a supporter of iSalud! and their mission to provide access to healthcare services for Oregon's vineyard workers and their families. In 2013, we presented a founding gift to fund a Mobile Wellness Unit that travels into the vineyards and provide on-site care.

Photo: Leda Garside, RN, BSN, MBA & Jim Bernau.



## "One of America's Great Pinot Noir Producers"

**WINEENTHUSIAST** 

Independent and Wine Enthusiast Owned

