

## Family Affiliated Funds

When the William E. and Margaret H. Davis family established the first ever Affiliated Fund at the Oklahoma City Community Foundation in 1986, it was a good idea whose time had finally arrived thanks to changes in the tax code. Instead of establishing a private foundation that would have required extensive oversight and administration, the Davis family decided to make the most of their charitable gift through an Affiliated Fund that allows the family to stay involved without the headaches of operating a private foundation.

A Family Affiliated Fund is established with a minimum gift of \$500,000 and is a separately incorporated 509(a)(3) supporting organization of the Oklahoma City Community Foundation with its own board of trustees and bylaws. Since the Davis Family Fund was established in 1986, more than 20 other families and nonprofit organizations have established Affiliated Funds at the Oklahoma City Community Foundation. For more information on Family Affiliated Funds and other fund options, visit [www.occf.org](http://www.occf.org) or call us at 405/235-5603.

# Great Gifts

## Creating a Family Legacy

### THE WILLIAM E. AND MARGARET H. DAVIS FAMILY FUND

The son of a David City, Nebraska minister, William E. "Bill" Davis comes from very humble beginnings. Like many other young men of his generation, he volunteered to selflessly defend his country. After 20 years of military service, he and his wife, Margaret, created their own American dream with the founding of Wm. E. Davis & Sons, an institutional food distributor.

From making food deliveries from the trunk of a car to building a company that would eventually become the state's largest food distributor, the couple and their six children were involved in the company's success. As a business and family man, Mr. Davis has always believed in the importance of a community that is a great place to live and work.

Active in numerous charitable and civic organizations over the years, he wanted to utilize the proceeds of the



*Mr. William E. "Bill" Davis and his children*

1986 sale of the company to benefit the community in perpetuity. Working with a professional advisor, the family established the William E. and Margaret H. Davis Family Fund, the first ever Affiliated Fund created at the Oklahoma City Community Foundation.

Since the establishment of the Davis Family Fund with a gift of \$1 million in 1986, the family has recommended nearly 900 grants totaling more than \$1.1 million to numerous nonprofit organizations. Because Mr. Davis and each of his six children recommends grants, the charitable distributions from the fund are a true representation of the family's far-reaching and varied charitable interests. In addition, thanks to the sound investment management policies of the Oklahoma City Community Foundation, the Davis Family Fund maintains a balance in excess of the original gift.

# Helping Our Community

Since 1969, the Oklahoma City Community Foundation has been helping donors help the community by offering flexible and efficient charitable giving options.

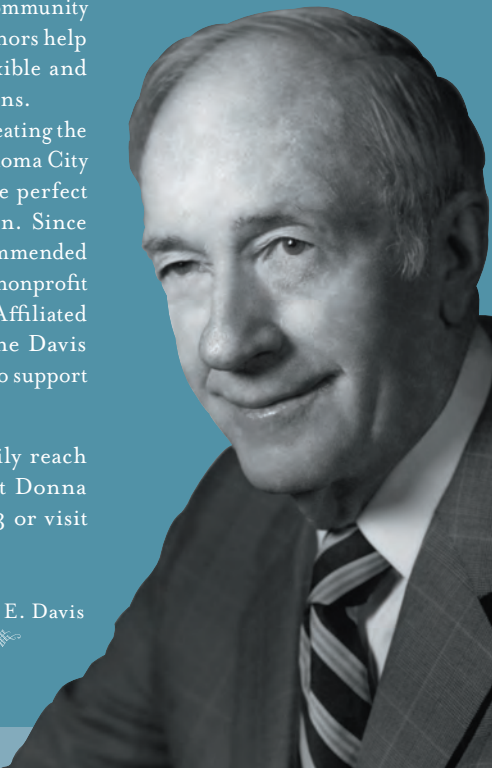
For Bill Davis and his family, creating the first Affiliated Fund at the Oklahoma City Community Foundation was the perfect alternative to a private foundation. Since 1986, the Davis family has recommended more than \$1 million in grants to nonprofit organizations. And, because an Affiliated Fund is a permanent fund, the Davis family's Great Gift will continue to support charitable causes in perpetuity.

Let us help you and your family reach your charitable goals. Contact Donna McCampbell at 405/235-5603 or visit [www.occf.org](http://www.occf.org).

William E. Davis



## Great Gifts



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