

## *Giving Later through a Planned Gift*

By making a gift through your estate, you defer your giving and create a charitable legacy. Below are examples of planned gifts.

A **Charitable Gift Annuity** allows a donor to make a gift with cash or other assets, receive income for life and at the end of the annuity contract, make a lasting gift to a charitable fund or funds of the donor's choosing.

**Retirement Plan Assets** are subject to both estate and income taxes. To reduce this burden on heirs and to create a charitable legacy, a donor can designate the remainder or a percentage of their IRA or qualified Roth IRA to benefit a charitable fund of their choosing.

**Bequests** allow a donor to designate a percentage, the residual or their entire estate to benefit an existing charitable fund or establish a new fund. A bequest can also provide a donor's family with substantial reductions in federal estate taxes.

**Life Insurance** can be an effective way for a donor to fund a charitable giving plan without significant outlays of cash.

Let us help you help your community. For more information please contact us at 405/235-5603 or visit [www.occf.org](http://www.occf.org)

 OKLAHOMA CITY COMMUNITY FOUNDATION  
*Helping you help the community*

*Thank you*  
*for your gift*



## *We appreciate your recent charitable gift.*

You may want to consider the following giving options when making a future gift to a fund at the Oklahoma City Community Foundation:

**Cash Gifts** – a cash contribution is one of the easiest ways to make a charitable contribution and can be in the form of cash, check, money order or cashiers check.

**Online Giving** – we offer a secure web site for donors who like the convenience of making contributions with a major credit card. The service is easy to use and can be found at [www.occf.org/donate](http://www.occf.org/donate).

**Real Estate** – if appreciated, capital gain taxes may be avoided on the real estate appreciation if the property is contributed for the benefit of a fund at the Oklahoma City Community Foundation. Gifting real estate may allow you to preserve liquid assets while maximizing your charitable contributions.

**Stocks and Bonds** – if appreciated, marketable or closely-held securities such as stocks and bonds offer a donor the ability to realize significant tax savings while maximizing the charitable contribution. We have accounts at many brokerage firms and can facilitate the transfer of securities.

**Oil & Gas Interests and Royalty Payments** – the contribution of oil and gas interests may allow the donor to preserve liquid assets while maximizing charitable contributions.

## *Our fund options make giving simple and flexible*

**Advised Funds** are the simplest and most flexible funds. Any of our three Advised Funds can be established in one tax year and provide the donor with an income tax deduction in that same year yet grant recommendations can occur at a later date. The **Legacy Fund** is a great alternative for families who want to create a lasting legacy and are considering a private foundation. The **Gift Fund** is ideal for the donor who wants the benefit of investment performance but desires the ability to distribute the entire gift to charity. The **Express Fund** is the perfect vehicle for donors who want to make a year end gift of appreciated stock or another non-cash asset to benefit one or more charities.

**Charitable Organization Endowments** are funds created to benefit one specific charitable organization for perpetuity. The Oklahoma City Community Foundation administers the nation's largest organizational endowment program with nearly 300 funds.

**Scholarship and Award Endowments** are established by individuals, families and organizations who seek to award those who are seeking to improve themselves through higher education.

**Unrestricted Funds** provide the greatest level of support for ongoing and future community needs and opportunities. Donors establish unrestricted funds in their name or in honor of a loved one.

**Field of Interest Funds** are ideal for donors who want their contributions to benefit a particular area of interest, type of organization, community issue or geographic area.

*(See other side)*