

# Legacy Giving For Donors

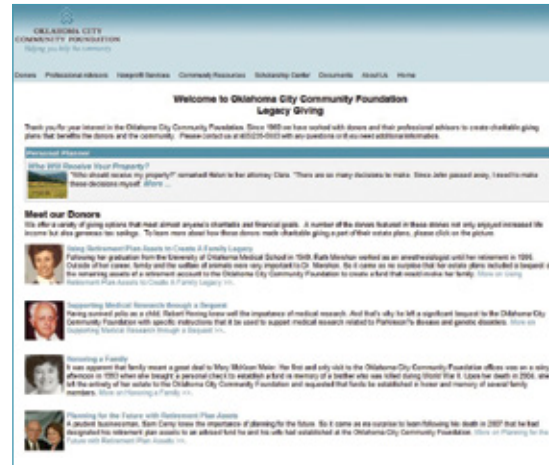
Legacy Giving is a comprehensive section of [www.occf.org](http://www.occf.org) devoted to information and tools for charitable gifts including bequests, trusts and charitable gift annuities. Legacy Giving offers important resources for both you and your professional advisors as you discuss estate plans and charitable giving. Go to Legacy Giving on the Donor menu or go directly to [www.occflegacy.org](http://www.occflegacy.org). Resources include:

**Create Your Plan** allow you to enter personal information and immediately view a presentation that indicates both income and tax benefits of certain charitable gift options.

On the **Wills Presentation** page, you will find a variety of ways to plan for your family and loved ones with a will or living trust. You can also request to receive a free Wills Kit that helps guide you and your professional advisor through the process.

Sign-up to receive a weekly **Donor eNewsletter** that provides news from Capitol Hill, a Savvy Senior column, motivating gift stories, financial news and timely articles all delivered to your e-mail inbox free of charge.

**Donors Stories** offers impactful stories of how individuals and families have worked with the Oklahoma City Community Foundation to create a legacy plan that benefits them and their community.



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For more information, contact us at 405/235-5603 or [info@occf.org](mailto:info@occf.org).

# Legacy Giving For Professional Advisors

**Legacy Giving** is designed to help professional advisors by providing the latest in estate planning tools and information. Find Legacy Giving on the Professional Advisors menu or go directly to [www.occflegacy.org](http://www.occflegacy.org).

Stay current on gift planning topics through **GiftLaw Pro**, a comprehensive charitable giving and tax information online service. GiftLaw Pro includes links to the Internal Revenue Code, U.S. Treasury regulations, private letter rulings, revenue rulings, revenue procedures, Tax Court cases, Court of Appeals cases and Supreme Court cases. GiftLaw Pro is updated quarterly.

The **Giftlaw Deduction Calculator** is a planned gifts calculator for professionals. The calculations follow the IRS format for charitable gift annuities and charitable trusts (remainder and lead).

**Washington Hotline** offers a daily update on both congressional and federal agency activities that impact charitable giving and estate planning.

Read the **Article of the Month** for thoughtful commentary and analysis on charitable giving vehicles.

A free weekly **eNewsletter** designed for professional advisors features the latest relevant news from Washington D.C., tax law updates, case studies and newsworthy articles. Sign up today.



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Discover our new online services and make your charitable planning easier than ever.



**Search function** – Search the entire Web site by typing in key words or phrases and a click of a button. The search feature is located on the upper top right portion of the site.

**Easier Viewing Options** – Visitors can now increase or decrease the size of the copy on any of the Web site pages. The **Smaller Type** | **Larger Type** tool is located just below the top navigation bar on the right hand side. In addition, the Web site is designed to be completely accessible for the visually impaired visitors who utilize a screen reader.

**Online Giving** – Our online giving service provides you the opportunity to make a gift to an endowment using a major credit card. This is a secure and convenient way to make a gift 24/7. Find Online Giving under Donors on the top navigation bar.

**Central Oklahoma Charities** – Considered the region's most comprehensive and up-to-date online nonprofit directory, Central Oklahoma Charities provides key contact information on more than 300 charitable organizations as well as a summation of services provided/audience served and an ability to make a gift to an organization's endowment via a secure online service. Find the directory under Community Resources on the top navigation bar.

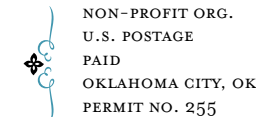
**DonorCentral** – Donors looking for up-to-date information on their fund can utilize DonorCentral, our online fund reporting system. Available to all permanent endowment funds, you can view current fund balance and investment return, as well as gift and grant history. Find DonorCentral under Donors and Nonprofit Resources on the top navigation bar.

**Let us share the good news with you!** Sign up for our Good News Updates and we will periodically send you an e-mail sharing the latest news from the Oklahoma City Community Foundation. Help us reduce costs and be kind to our environment. To sign up, please go to [www.occf.org/email](http://www.occf.org/email) and complete the online registration form.

 Visit the new [www.occf.org](http://www.occf.org)



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Confirmed in Compliance with National Standards for U.S. Community Foundations