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Ways to Maximize Your Charitable Deduction

While tax laws have recently changed, smart taxpayers can still benefit from giving options through the Oklahoma City Community Foundation.



Bundling Donations

With the recent increase in the standard deduction, many donors are using advised funds to “bundle” charitable gifts for several years into one calendar year. This strategy allows you to exceed the standard deduction in one tax year, while using an advised fund to support your favorite charitable causes over several years.



Appreciated Assets

By making a charitable gift of appreciated assets including real estate, oil and gas royalty interests or widely- and closely-held stock, bonds and mutual funds, you can potentially avoid capital gains tax, preserve your current cash flow and generate a charitable tax deduction.



Charitable Gift Annuities

The recent increase in charitable gift annuity rates makes these life income gifts even more beneficial for those over retirement age. By making a gift of cash or other assets, you can create a lifetime income stream for yourself or a loved one, receive a charitable tax deduction and support the causes you care about.



IRA Rollover

If you are age 70 ½ or older, you can gift up to \$100,000 per year directly from your IRA to the Oklahoma City Community Foundation to support or create a new scholarship fund or a charitable organization endowment fund. By using your pre-tax IRA assets, your charitable gift costs you less. In addition, IRA rollover gifts can be used to meet your required minimum distribution and are not subject to income taxes.

Visit occf.org/yearend to learn more!

To learn how we can help you make the most of your charitable deduction in 2018, contact **Joe Carter at 405/606-2914**. We look forward to helping you meet your year-end goals!



OKLAHOMA CITY COMMUNITY FOUNDATION

Maximize YOUR Charitable Deduction

with the new tax law



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COMMUNITY FOUNDATION
1000 N. Broadway Ave., Oklahoma City, OK 73102
405/235-5603 | occf.org

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through the Oklahoma City Community Foundation!*



Bundling Donations



Appreciated Assets



Charitable Gift Annuities



OKLAHOMA CITY
COMMUNITY FOUNDATION

Helping you help the community

Let us help! 405/606-2914

IRA Rollover

