



ADVISED FUNDS

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OKLAHOMA CITY
COMMUNITY FOUNDATION

Helping you help the community

1969-2004
Celebrating 35 years

405 235 5603 fax 405 235 5612

P.O. BOX 1146 73101-1146

1300 N. BROADWAY DR.

OKLAHOMA CITY, OK 73103



Make
your
charitable giving
powerful.



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OKLAHOMA CITY COMMUNITY FOUNDATION

In accepting a contribution to any fund, the Oklahoma City Community Foundation trustees commit to the donor that the contribution will be protected for the charitable purpose originally intended. The variance power, as described in the governing documents of the Oklahoma City Community Foundation, assures donors that if the charitable purpose of their contributions becomes impractical or impossible, the distributions will be directed to similar purposes in the community.

Make your charitable giving powerful by establishing a Legacy Fund at the Oklahoma City Community Foundation. One of three fund options available through our Advised Fund Program, a Legacy Fund is the most effective alternative to a private foundation. A Legacy Fund is simple to start, grants can be made in any amount to any charity at any time and the Oklahoma City Community Foundation handles all of the administrative details.

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A Legacy Fund distributes annual earnings rather than principal thus allowing an individual or family to build a charitable giving foundation that starts a legacy of giving within the community.

A Legacy Fund is established with a minimum of \$10,000 and offers the following benefits:

- It's a permanent endowment fund with an annual spendable amount.
- The fund is invested in the Oklahoma City Community Foundation's investment pool or a money market alternative; fees are lowest available for advised funds.
- The spendable balance allows for grants to be recommended at any time in any amount to any charitable organization.
- Fund and gift reports are available online through DonorCentral as well as annual printed reports.
- Succession to generations of advisors is available.
- An expert staff is available to advise and provide all administrative support.
- Legacy Funds are recognized in our Annual Report.
- Anonymous grant making is available upon request.

For information on how to establish a Legacy Fund or for more information on our Advised Fund Program, please contact Jennifer Stewart at 405/235-5603.

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HIGHLIGHT



O.K. Detrick Foundation Legacy Fund

Wanting to ensure that the charitable gifts made through her grandfather's

private foundation would continue well into the future, Gail Beals and her family came to the Oklahoma City Community Foundation to establish the O.K. Detrick Foundation Legacy Fund.

A successful independent oil operator in eastern Oklahoma, Mr. Detrick is remembered as a generous and philosophical man with a quick wit and one who always responded to those in need. When he died in 1964, his estate established a private foundation to support his charitable interests. While the family managed the foundation for nearly 40 years, they wanted assurance that Mr. Detrick's charitable wishes would continue into perpetuity. That's why they moved the assets to the Oklahoma City Community Foundation.

"Everyone in the family is so happy to have the O.K. Detrick Foundation at the Oklahoma City Community Foundation," Beals says. "How lucky we are that there is such a foundation in Oklahoma and especially one that is so capable of handling oil and gas leases and royalties."