

# Harry & Rosemary Koelsch

*Making A Difference Through A Legacy Fund*



Married 49 years, Harry and Rosemary Koelsch live their lives according to values their hardworking parents instilled in them: honesty, faith and family. Harry, a retired member of the Sheet Metal Workers Local #124 Union, and Rosemary, a stay-at-home mother and later an educator, emphasized these values with their four children through family meals, shared activities and attending church. They also led by example through their volunteer work and charitable giving.

In 1995, the couple's daughter Valerie was killed in the bombing of the Murrah Federal Building. Thanks to Harry's union, a scholarship fund was established at the Oklahoma City Community Foundation in Valerie's memory that each year makes an award to a dependent of a union member.

In 2005, upon the advice of their professional advisor, the Bethany, Okla., couple used a gift of appreciated stock to establish a Legacy Fund at the Oklahoma City Community Foundation. "Our past experience with Valerie's scholarship fund and your reputation for efficient management made it an easy decision," Mrs. Koelsch said.

Through the Harry and Rosemary Koelsch Fund, the couple supports the causes and organizations important to their family. And because a Legacy Fund is a permanent fund, Harry and Rosemary know their charitable giving will continue to make a difference well into the future.



OKLAHOMA CITY COMMUNITY FOUNDATION

*Helping you help the community*

# Making A Difference Through A Legacy Fund

One of three fund options available through our Advised Fund Program, a Legacy Fund is a permanent endowment that is the most effective alternative to a private foundation. It 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.

A Legacy Fund distributes annual spendable earnings rather than principal, allowing an individual or family to build a charitable fund that starts a tradition of giving. A Legacy Fund can be established with a minimum gift of \$10,000 and offers the following additional benefits:

- The fund is invested in the Oklahoma City Community Foundation's general investment pool or a money market alternative.
- The fees are the lowest available for advised funds.
- Fund and gift reports are available via DonorCentral, a secure online reporting system, and through annual printed reports.
- Succession to generations of advisors is available.
- An expert staff is available to assist you and provide all administrative support.
- Anonymous grant making is available.

For more information on how you can make a difference through a Legacy Fund or other advised fund options, please contact us at 405/235-5603 or visit [www.occf.org](http://www.occf.org).



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

12/07



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