



## Grow Your Nonprofit Organization through Planned Giving

A strong planned giving program can help sustain your organization's long-term financial stability. The Oklahoma City Community Foundation offers training and resources to help our charitable organization endowment participants understand the basics of planned giving. A planned giving program can be as simple as providing your donors with the opportunity to make a charitable gift through their will or estate plan. Through our Seeds of Planned Giving program, our staff will provide valuable expertise to help you implement planned giving into your organization's development efforts.

### Seeds of Planned Giving Program

Classes will be held at the Oklahoma City Community Foundation offices from 11:30 a.m. -1 p.m. There is no fee and lunch will be provided.

- May 4**                **Bequests:** Learn how to identify planned giving candidates. Marketing bequests is the simplest way for donors to leave a substantial gift to charity.
- June 15**             **Charitable Gift Annuities (CGAs):** Learn how a donor's charitable gift can increase their current income. Through CGAs, donors can receive an income stream for life and make a significant gift to charity.
- August 24**         **Charitable Remainder Trusts (CRTs):** Do you have a donor with highly-appreciated assets? Learn how they can eliminate capital gains taxes, reduce or eliminate estate taxes and improve lifetime cash flow.
- September 21**     **Advanced Planning:** Learn about Charitable Lead Trusts and other planned giving instruments that provide immediate or deferred tax consequences including gift and estate tax benefits.
- November 7**        **Crescendo Planned Giving Marketing Seminar (location TBD):** Learn more about marketing planned gifts to your donors at a Crescendo seminar. Crescendo is an integrated marketing provider of planned giving solutions.

### Five Steps to Launch Planned Giving Development

1. Define the impact of a planned gift on your organization.
2. Identify your loyal donors.
3. Understand why your loyal donors are with you.
4. Add one or two sentences to your communications materials about estate gifts.
5. Begin and commit to calling two people a week.

For more information about the Seeds of Planned Giving Program, please contact Gayle Farley at [g.farley@occf.org](mailto:g.farley@occf.org) or 405/606-2910.

# Planned Giving Messages to Include in Donor Communications

## One-line Messages

Including a simple message about planned giving in your communication materials can be a consistent reminder to your donors to remember your organization in their estate plans. Place the message at the bottom of letterhead, on envelopes, in your newsletter, in your email signature and on your website. Sample messages include:

- Remember, you can provide for [organization]’s future with a gift through your will.
- Please remember [organization] when making your long-term financial plans.
- Have you considered including [organization] in your long-term financial plans?

## Standard Bequest Language for Wills

Simplify the process for donors to include your organization in their will by providing sample bequest language. Below is an example of a message to include in your marketing materials:

If you would like to help further the work of [organization] but are unable to make a significant gift today, a charitable bequest to our endowment at the Oklahoma City Community Foundation may be the perfect solution. A bequest through your will or revocable trust allows you to support our mission without impacting your lifestyle and commitments today. The sample bequest language below can assist you and your professional advisor with including a charitable gift in your will to [organization] endowment fund at the Oklahoma City Community Foundation:

”I give the sum of \$\_\_\_\_\_ [or state a percentage of the residual estate] to the [organization] Endowment Fund at the Oklahoma City Community Foundation, (EIN: 23-7024262), an Oklahoma City nonprofit and 501(c)(3) tax exempt organization.”

## Beneficiary Designations

Another simple way for your donors to leave a planned gift to your organization is through beneficiary designations on their life insurance policy, retirement plan or other assets. Below is a sample message for your donors:

You can make a great difference to our mission and our future by naming [organization] as a beneficiary of your life insurance policy, retirement plan or other assets. You can make a beneficiary designation gift without changing your current will or trust. Examples of how you can make an important gift to our endowment fund that cost you nothing during your lifetime include:

- Life insurance beneficiary designation
- Retirement plan beneficiary designation
- Fixed or variable annuity beneficiary designation
- Payable on Death or Transfer on Death designations on bank and brokerage accounts

Simply contact your broker, insurance agent or banker to obtain a new beneficiary designation form and list us as either the primary or contingent beneficiary along with the amount or percentage of the policy or account you would like for us to receive. Once the form is completed and signed, send it back to your broker, insurance agent or banker. By making the gift payable to “the [organization] Endowment Fund at the Oklahoma City Community Foundation, (EIN: 23-7024262), an Oklahoma City nonprofit corporation” you can be assured that your gift will receive expert stewardship and help us meet our long-term needs. Of course, while these beneficiary designation gifts do not require that you make changes to your will and trust documents, they must be considered in light of your overall financial and estate plan.

To learn more about making a legacy gift to [organization]’s endowment fund, please contact [staff contact] or Joe Carter, Director of Development and Planned Giving at the Oklahoma City Community Foundation by calling 405-606-2914 or email [j.carter@occf.org](mailto:j.carter@occf.org).

**Please note:** This information should not be considered as legal, tax or financial advice. Consult your professional advisor for further information and guidance.

