

2017 Seeds of Planned Giving Series

The Oklahoma City Community Foundation is pleased to once again offer the Seeds of Planned Giving series for participants in our charitable organization endowment program. Learn how a planned giving program can help provide long-term financial stability for your organization, while offering your donors flexible giving options. Our staff will provide easy-to-implement tips and best practices to help you design and execute a planned giving program to boost your development efforts.

Save the Date!

- Jan. 12** *Planned Giving 101: Basics of planned giving and how it can benefit your organization.*
- Feb. 8** *Bequests: Simple ways to help your donors make charitable gifts through their will or trust.*
- March 22** *Crescendo Planned Giving Marketing Seminar (location TBD): Best practices for marketing planned giving options to your donors. This will be an off-site, all day event provided by Crescendo.*
- April 13** *Charitable Gift Annuities (CGAs): Charitable gifts that benefit your organization and yield annuity payments to your donors.*
- May 11** *Charitable Remainder Trusts (CRTs): Charitable gifts that create a lifetime income stream and tax-savings for donors.*
- June 7** *Advanced Planning: Creative planned giving strategies including charitable lead trusts and retained life estate gifts.*

Time: 11:30 a.m. – 1 p.m., lunch provided.

Location: Oklahoma City Community Foundation, 1000 N. Broadway Ave., Oklahoma City

Cost: FREE for charitable organization endowment program participants, must register to attend.

To Register: Visit occf.org/seeds or contact Gayle Farley at g.farley@occf.org or 405/606-2910.



How Can the Seeds of Planned Giving Series Help You?

“The planned giving training was very beneficial. Many of our supporters are nearing retirement age, and estate gifts are an untapped resource. By working together with the Oklahoma City Community Foundation, we can offer donors more flexible giving options and grow our endowment to ensure long-term support of our organization. It’s a win-win.”

Paul Moore, president of ESCCO,
The Executive Service Corps of Central Oklahoma