

Planned Giving Services and Resources For the Charitable Organization Endowment (COE) Program

What is a planned or estate gift?

These are charitable gifts that are planned by a donor and often provided for in their estate plan. Examples of planned gifts include: charitable gift annuities (CGA), charitable remainder trusts, bequests included in wills and retirement plan assets.

What we provide:

The Oklahoma City Community Foundation is available to work with COE organizations to help develop their endowment funds. Planned or estate gifts can be of great benefit to endowments. Our planned giving services make it easy for COEs to promote estate gifts to benefit an organization both now and in the future. For more information on the planned giving services and resources listed below, please contact Joe Carter at 405/606-2914 or Jennifer Meckling at 405/606-2951.

◆ Through our Planned Giving Services, OCCF offers:

- Training
- Technical assistance with planned gifts
- Professional management of gift principal year-after-year
- Full tax advantages of a qualified nonprofit organization
- Staff that will work with donors and their professional advisor to facilitate gift

◆ We provide the following administrative and management services:

- Manage funds
- Handle investments
- File tax returns
- Make beneficiary payments
- Bear fiduciary responsibility

◆ Provide technical support:

- Answer staff/board questions
- Work with donors
- Work with professional advisors
- Legacy Giving – online information and tools for estate gifts

◆ Provide access to split-interest gift calculations at www.occf.org/legacy

◆ Provide trustee services for charitable trusts

◆ Provide all administrative services for charitable gift annuity contracts

◆ Provide planned giving articles for inclusion in newsletters

◆ Provide list of planned giving resources – books, periodicals, websites, vendors, consultants

◆ Assist in the development of Planned Giving Program for your organization including a action plan, calendar of activities and materials