

FREQUENTLY ASKED QUESTIONS

about Gifts to Your Endowment Fund at the Oklahoma City Community Foundation

1 What happens when someone gives to our endowment at the Oklahoma City Community Foundation?

The Community Foundation acknowledges all gifts received for the benefit of your endowment with a letter to the donor, including any appropriate tax language. You will also be notified by email of the gift. Log into your fund portal for contact information so that you can reach out to the donor personally. The gift is credited to your endowment fund and invested with our pool of funds to provide continued support for your organization. You can also keep up with gifts in your Fund Portal online account.

2 How should we properly acknowledge a gift to our endowment?

In short, express your gratitude and leave the IRS out of it completely. A good approach is to explicitly state that the contribution was received by the Community Foundation and you are merely following up to let them know how much you appreciate it. Making sure your acknowledgement doesn't look like a tax receipt ensures that donors don't double count the deduction. Also see "COE Gift Acknowledgement Process."

3 Why did the donor choose to give to endowment rather than to our agency directly?

That's a good question and a great conversation opener with a donor! There are many reasons why a donor might choose to give to your endowment fund, and hearing their answer to that question may help you determine how to best cultivate and steward that relationship and help the donor understand how they can support your needs today as well as leave a lasting gift to support your cause tomorrow.

4 How can I let donors know they can give to our endowment?

Passive information on your website, Facebook page or newsletters lets donors know you have an endowment fund. If you are engaged in a campaign to increase your endowment you can share some of the language included in the document "All About Endowment: Inspiration to Share with your Donors."

5 How can I publicly acknowledge gifts to our endowment?

When listing a gift to your endowment in publications such as news releases, annual reports and websites, you have an opportunity to encourage additional gifts as well as promote greater understanding of endowment. Consider something like this: ABC Donor has contributed to XYZ Agency's permanent endowment fund at the Oklahoma City Community Foundation, providing perpetual support for our mission/program. If you would like to give cash or non-cash assets that will provide support year after year, please reach out to our development director.

6 What should we NOT do when we receive a gift to endowment?

Do not send a tax letter of any sort to anybody. Any tax benefit has already been given and an additional letter from you could result in confusion.

Do not add OCCF to your mailing list; we do not pass along solicitations or thank yous to donors.

7 How can donors give directly to our endowment fund at Oklahoma City Community Foundation?

Giving to your endowment is easy for cash, online gifts, assets and more. See the document "Directing gifts for the benefit of your fund at Oklahoma City Community Foundation."

GIFT ACKNOWLEDGMENT

Contributions to your Charitable Organization Endowment Fund

From Start to Finish

1 Gift Received at OCCF.

A gift is received at the Oklahoma City Community Foundation for the benefit of a charitable organization's endowment.

2 Processing & Compliance.

The gift is processed through the Community Foundation's accounting procedures and credited to the appropriate endowment fund.

3 Donor is Acknowledged.

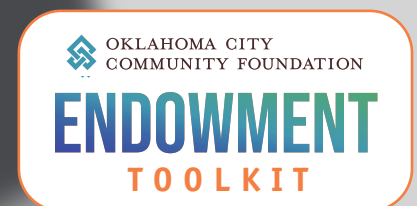
An acknowledgment of the gift is sent directly to the donor by mail with any appropriate tax language included. Any tribute or honor is also notified with a similar letter.

4 Nonprofit is Notified.

An acknowledgment of the gift is sent to the charitable organization by email only. Some donors request to be anonymous, and that wish is observed. Contact information for donors is available in your fund portal.

5 All at Your Fingertips.

A record of all contributions to your endowment fund is available through your fund portal online, allowing you to express your gratitude for gifts as they come in, and as you receive distributions each year.



2022/23 WORKSHOPS & EVENTS

for Endowments and Planned Giving

Jul 2022

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3	4	5	6	7	8
10	11	12	13	14	15
17	18	19	20	21	22
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31					

Aug 2022

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Sep 2022

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Nov 2022

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Dec 2022

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Jan 2023

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Feb 2023

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Mar 2023

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Apr 2023

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May 2023

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Jun 2023

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- Seeds of Planned Giving
- Focus on Endowment

Courses/Events location:
Oklahoma City
Community Foundation
1000 N. Broadway Ave.
Oklahoma City, OK 73102

Free Parking in
Rear of Building



Register here!
occf.org/training

Dates subject to change.

2022

- October 6 10 a.m. – 11:30 a.m. Endowment 101 (Zoom)
- December 8 10 a.m. – 11:30 a.m. Endowment 101 (Zoom)

2023

- January 11 11:30 a.m. – 1:00 p.m. Planned Giving 101
- January 18 10 a.m. – 11:30 a.m. Endowment 101 (Zoom)
- February 9 11:30 a.m. – 1 p.m. The Easy Ask: Bequests and beneficiary designations
- February 15 3 p.m. – 4:30 p.m. Endowment Superstars: panel discussion of strategies that work
- March 8 11:30 a.m. – 1 p.m. Your Back Office: CGAs and CRTs
- March 15 3 p.m. – 4 p.m. Keeping up with your endowment: online tools & tips (Zoom)
- April 13 11:30 a.m. – 1 p.m. Starting the Conversation: How to talk your donors about planned gifts
- April 19 11:30 a.m. – 1 p.m. Endowment 101
- May 10 11:30 a.m. – 1 p.m. Advanced Planned Giving
- May 17 10 a.m. – 11:30 a.m. DAF 101 (Zoom)
- June 7 11:30 a.m. – 1 p.m. Marketing donor-centered gifts
- June 14 11:30 a.m. – 1 p.m. Campaign Case Studies

FEATURED LINKS

for Initiatives, Programs and Tools



Workshops

Save the date for these workshops. From planned giving and endowment growth strategies to GiveSmartOKC, we've got you covered!



 KeepMovingOKC

KeepMovingOKC

Does your organization offer active opportunities for clients or volunteers? Promote it on our dedicated wellness portal!



Community Grants

We're looking for great community partners for our community grants. Check out these opportunities for children, elderly, healthcare access and more.



Endowment Matching Grants

The Kirkpatrick Family Fund offers endowment matching grants to qualified organizations. Check grant guidelines to see if you are eligible.



Stories

Your stories are our stories! See how OCCF has connected donors and nonprofits to make our community a better place.



Fund Portal

Access information about your endowment 24/7 on our new fund portal. If you're not connected, reach out to our team to get your account set up.



Meeting Rooms

We're open to the public! Learn more about the variety of spaces we have available for your meetings. Reach out to our friendly staff for more info.



 GiveSmartOKC
Know More. Give More.

GiveSmartOKC

GiveSmartOKC is your direct connection to strategic, deliberate donors as well as the data to help illustrate community need and your positive impact. Work with our team to make your profile shine!

TERMS OF ENDOWMENT

A Glossary of Endowment Language

Appreciated property

Property (including stocks, bonds, mutual funds, real estate, cryptocurrency, etc.) that is worth more today than it was when purchased. Generally, donating appreciated property to a charity allows the donor to avoid, reduce or defer the realization of capital gains tax.

Asset allocation

The determination of how one's assets, or accumulated wealth, will be distributed after death.

Bequest

A gift of real or personal property made at death by a will, a trust or beneficiary designation.

Capital gains tax

Tax imposed by the IRS on the gains made on the sale of real property — i.e., stocks, bonds, cars, boats, land, real estate or private or closely held stock and commodities.

Charitable deduction

An income, estate, or gift tax deduction allowed against certain transfers benefiting a qualified charitable organization. These gifts can be reported on a donor's tax return which may offset taxes owed.

Charitable Organization Endowment (COE) Program

OCCF's programmatic support of the 380+ designated agency funds endowed for the benefit of a named Charitable Organization.

Corpus

The property making up the principal of a trust or endowment, as opposed to the income it produces. Also known as "principal."

Distribution

The amount of the endowment fund approved for granting from the fund each year, as set forth in the OCCF COE Fund Policy, currently set at 5 percent of the market value averaged over 12 quarters, ending March 31 for calculation purposes.

Donor advised fund

A giving vehicle that allows donors to make a charitable contribution, receive an immediate tax deduction and then recommend grants from the fund over time. Donors can contribute to the fund as frequently as they like, and then recommend grants to their favorite charities whenever it makes sense for them.

Fund Portal

Your online access tool for up-to-date financial information about your fund, including donors to the fund, grants (distribution) from the fund, current market value and access to periodic detailed reports.

Due diligence

OCCF's process of ensuring that the nonprofits we grant to are fulfilling their own compliance requirements with the IRS and the State of Oklahoma. We take our responsibility to the IRS seriously to protect the tax deductions and philanthropic intentions of our donors, as well as our standing with the IRS.

Endowment fund

A fund that is created by donors or organizations requiring the restriction of the gift(s) in perpetuity with only a specified amount allocated for spending.

Estate tax

A transfer tax imposed by the federal government and some states on the estate of a decedent. A tax on the privilege of transmitting property at death, payable from the estate.

Fees

Administrative costs of a fund supporting the activities necessary to manage, invest, document and distribute. OCCF fund fees are assessed and deducted from the fund on a quarterly basis. Fees are set forth in the fund policy.

Fiscal year

OCCF's fiscal year is from July 1 through June 30. Your organization's fiscal year may be different.

Fund agreement

A legally binding agreement between a nonprofit organization and the Oklahoma City Community Foundation that specifies terms and details governing the establishment and continuance of an endowment fund at OCCF.

Fund policy

An OCCF trustee-approved, document that specifies the details of investment, distribution, purpose, intention, reporting and dissolution policies for Charitable Organization Endowment funds.

GiveSmartOKC (GSO)

GiveSmartOKC.org is an online resource that provides in-depth and comparable data on more than 300 local nonprofits and the community needs around it, to help donors find charities that fit their interests and make smart giving decisions. A GSO profile is one of the smartest ways for you to tell your story and put your nonprofit cause in front of donors.

Investment pool

A group of funds—including endowment funds—that are invested in a broadly diversified portfolio. In the case of our endowment funds, these are invested conservatively for long-term growth to provide for your organization and its causes well into the future.

TERMS OF ENDOWMENT

A Glossary of Endowment Language

Kirkpatrick Family Fund

Founded in 1989 by John and Eleanor Kirkpatrick, the Kirkpatrick Family Fund is the largest affiliated fund of the Oklahoma City Community Foundation. The fund remains committed to supporting philanthropy in central Oklahoma, especially through the support of nonprofit organizations. To this day the fund supports endowment growth by offering an annual matching grant challenge to our COEs investing in their endowment fund (some exclusions apply).

Market value

The actual value of the endowment fund. This value includes additional income provided through gifts and growth through investment performance. It also includes decreases in the total value that arise from distributions, administrative fees and endowment management. Decreases in value can also arise from negative investment performance.

Matching gifts program

A grant or contribution program that will match gifts made to qualifying charitable organizations. Specific guidelines are established by each employer or foundation.

Oklahoma Solicitation of Charitable Contributions Act

Revised in 2011, this requires that all nonprofits soliciting charitable donations, regardless of revenue, must register with the Oklahoma Secretary of State each year. Exempted from the registration are churches, schools and universities and some member-based organizations.

Organization fund or x-fund

Charitable contributions from your organization into your endowment fund, as opposed to gifts from a third party into your endowment fund, are accounted for separately in this fund that will have “Organization” at the end of its name. This fund is reflected in your assets for year-end accounting. For finance geeks, see ASC 958-605.

Planned gift

Contributions made as a result of a process to choose the most appropriate gift for the most important purpose in the most advantageous time frame for the donor, the charity and the donor’s heirs. All planned gifts administered by OCCF will be credited to a charitable organization’s endowment fund.

Private foundation

A non-governmental, nonprofit organization with funds (usually from a single source, such as an individual, family or corporation), programs and grant-making managed by its own trustees.

Spendable fund or reserve fund

Not part of your permanent endowment but held by the Community Foundation and invested with the pooled funds to take advantage of strong investment performance. Distributions from the fund may be requested by your board quarterly. Special balance limits and fee structures apply.

Spendable balance

Amount of money available to be distributed. This may show a positive balance for your funds for several reasons, such as undistributed scholarship funds, imminent annual distribution or a spendable reserve fund.

Spending policy

The value of a fund available to be distributed annually, with the objective to balance long-term support against short-term gain. Because OCCF endowment funds use a 5 percent, 12-quarter average, distributions are shielded from volatility in investment performance.

Stewardship

The development of relationships with donors including appropriate acknowledgement of gifts, ensuring that gifts are used in accordance with donor’s wishes, reporting to donors and/or other parties when required or appropriate to do so.

Toolkit

An online resource repository for OCCF’s charitable organization endowments, available at occf.org/toolkit including archived eNews COE newsletters, wills kits, Fund Portal user guides and information about Kirkpatrick Family Fund matching grants.

Variance power

An important distinguishing feature of a community foundation is the “variance power” found in the Treasury Regulations at Section 1.170A-9(f)(1)(v)(B). The variance power gives a community foundation greater flexibility to adapt to the changing charitable needs of the community. More specifically, the variance power gives a community foundation the unilateral power to change the charitable purpose of a fund if circumstances have sufficiently changed to make the original restriction inappropriate — most notably when an organization folds its operations.

Reading Your Fund Statement

Beginning balance

The corpus, plus accumulated investment returns, minus allocated spending and fees, as of the start of the quarter.

Ending balance

The corpus plus accumulated investment performance, minus allocated spending and fees at the end of the quarter.

Fund balance

The net worth of a fund, measured by total assets minus total liabilities for the designated fiscal year (July 1-June 30).

Contributions

Donated assets given directly to the endowment fund, either from the endowed organization or from a third party. You can see every gift dating to 1997 in your Fund Portal account. Your yearly reports will show contributions by donor. You should know every name on your gift list!

Investment performance

This represents the accumulation of gains, losses, income and dividends on investments in the pool and is net of investment management fees.

ALL ABOUT ENDOWMENT

Inspiration to Share with your Donors

Use this sample text in newsletters and emails to raise awareness about your endowment!

What is Endowment?

Endowment is like a savings account that only spends the interest. Our endowment fund with the Oklahoma City Community Foundation grants us 5% of the fund each year. The remainder continues to grow in value. When you give to our endowment fund, you are giving a gift to our future! Give to our future by clicking here: donate.occf.org*

Our endowment fund with the Oklahoma City Community Foundation is like a retirement fund, except this one never retires and never runs out! Give to our future by clicking here: donate.occf.org*

Our Endowment Working Through the Years...

Our endowment with the Oklahoma City Community Foundation has received **[\$gifts]** in gifts but has given back **[\$distributions]** over the years. Today, it is worth **[\$fund value]**. To learn more about our endowment contact **[development director email]** today!

Our endowment was established in **[year]** by **[person instrumental in endowment]** with a gift of **[\$first gift]**. We are so thankful for their foresight and faith in our future! To learn more about **[person instrumental in endowment]** and their legacy for the future, contact **[development director email]** today.

Why Give to Endowment?

Endowment funds are invested for long-term growth and eventually give back more than is put into them. In this way, your gift today will give back forever. You can give back forever by clicking here: donate.occf.org*

We believe in our mission and think you do too! Endowment is a way to ensure that there will be support for our mission long into the future. Support our mission long into the future by clicking here: donate.occf.org*

Giving to our endowment fund ensures that we will have income to support our mission as long as we need it. You can be a part of our long-term support by clicking here: donate.occf.org*

Endowment is a great way for you to know that a larger gift will be spent wisely. Your gift will have a lasting impact, eventually far surpassing the amount of your original gift! To learn more about leaving a legacy, contact **[development director email]** today.

Gifts to endowment are a wonderful way to honor a loved one. Their memory will be kept alive by giving a gift in their name every year! To give a gift in memory of a loved one, contact **[development director email]** today.

Many donors endow their annual gift, contributing a larger gift to endowment that will provide continued annual gifts forever. To endow your annual gift, contact **[development director email]** today.

Historically, a gift to our endowment will give back its full value to us within 15 years, and then continue to give even more! To give a gift that will be worth more tomorrow, click here: donate.occf.org*

* You can also link **directly** to your fund's giving page. Ask us how!

COMMUNICATIONS RESOURCES

Charitable Organization Endowment Program

The Charitable Organization Endowment Program provides a variety of tools and resources to help participating organizations promote and grow their endowments. Learn more at occf.org/coeprogram.

THE TOOLKIT

The online toolkit at occf.org/toolkit features free resources to help organizations build and promote their endowment funds. Including:



How to Link to GiveSmartOKC

Each program participant is featured on our searchable, online directory at GiveSmartOKC.org with their profile that includes contact information, website links and a link to make an online gift to their endowment fund.



How to Link to Legacy Giving

Legacy Giving is a free, online tool that provides charities, donors and professional advisors with resources on charitable giving, including a gift calculator at occflegacy.org.



How to Link to Online Giving for your Endowment

Our online giving service processes credit card gifts through a secure server and offers an easy way for donors to make a gift directly to an organization's endowment fund. Links from your website to our online giving form should be directed to: donate.occf.org. Ask about a unique link to your own endowment giving page.



Endowment News

Our monthly e-newsletter for charitable organizations in our endowment program features insights and tips to help grow your endowment, as well as useful tools on how to use your GiveSmartOKC profile. Find an online archive of past issues at occf.org/toolkit and subscribe at occf.org/enews.



Fund Portal Guide

Participants have 24-7 access to a secure, online reporting service made available to the charitable organizations' staff and boards of directors so they can view fund balances, financial statements, investment performance and gift and distribution history at occf.org/fundportal.

Look for our quarterly Endowment 101 that reviews the tools available in your fund portal. See courses at occf.org/coetraining



Publications

An annual update on the Charitable Organization Endowment program is mailed to donors, potential donors and community leaders encouraging support of the endowments. In addition, charitable organization endowments are promoted in the annual report of the Oklahoma City Community Foundation, along with donor funds and stories, financial summaries and highlights from the most recently completed fiscal year. You see our current publications at occf.org/pubs.

You can also view our current library of videos and commercials at occf.org/stories.

DIRECTING GIFTS

for the Benefit of Your Fund at the Oklahoma City Community Foundation

PHYSICAL CHECKS

Cash contributions may be in the form of cash, check, money order or cashier's check.
Office hours are Monday – Friday, 8:30 a.m. – 5 p.m.

Checks should list "Oklahoma City Community Foundation" as the payee, with a memo reading "fbo <your organization/initiative/fund>"

Mail To:

Oklahoma City Community Foundation
PO Box 1146
Oklahoma City, OK 73101-1146

Deliver To:

1000 N. Broadway Ave.
Oklahoma City, OK 73102

By Wire/ACH:

Please contact us

ONLINE GIFTS

We process credit card gifts to your endowment funds through our secure online giving service. If you have a link on your website to our online giving service you may want to check your link to ensure it's going to the correct page. All gifts made with a credit card are subject to a fee to offset the credit card banking charges. However, the full amount of the gift made online is tax-deductible.

Links from your website or social media to our online giving can be directed to: donate.occf.org where donors will select the name of the endowment fund they wish to donate to. We can also show you how to share a direct link to a dedicated giving page for your endowment, just ask!

NONCASH GIFTS

For information about noncash gifts and planned giving, direct your donors to www.occf.org/howandwhattogive or have them contact our team directly:

**Jennifer Meckling**

Charitable Organization Endowment Program Director
j.meckling@occf.org, 405-606-2951

**Joe Carter**

Vice President, Development
j.carter@occf.org, 405-606-2914

ANNOUNCING A FUND OR CAMPAIGN

Media Information

So you've got an endowment fund at the Oklahoma City Community Foundation. Great! That means you're taking steps to secure a future for your organization! Now, it's time to share that news with the world and begin building that fund.

The Oklahoma City Community Foundation will announce new Charitable Organization Endowments and matching campaigns as they are established, but *it is your responsibility to promote and grow your fund at the Community Foundation*. To assist you with this, we are providing tips on how to promote your endowment fund. If you have any questions, please do not hesitate to contact Dan Martel, Vice President of Communications, at 405/606-2941 or d.martel@occf.org

How Do I Share About My Endowment?

1. Media Release

The news media is an excellent place to start. In this packet, you will find a sample news release as well as contact information for a number of area media outlets with tips on how to contact and communicate with the media.

- a. Most media outlets (television, newspaper, magazine and radio) prefer to receive news releases via email. Once the news release has been sent, we recommend you contact the media outlet to ensure the news release was received. NOTE: When emailing a release, it is recommended that the news release be part of the body of your e-mail. Many media outlets will not open emails that contain attachments.
- b. You may also mail the news release directly to the media outlet. If you choose this method, it is important to send it to the appropriate person, either an assignment editor or the reporter who covers charitable organizations, community issues or yourspecific service area. Confirm the appropriate contact via a telephone call to the newsroom before mailing the news release.

OKC Metro Area Newspapers (Daily & Weekly)

The Daily Oklahoman	dmecoy@oklahoman.com	405/475-3979
The Daily Oklahoman	nonprofits@Oklahoman.com	405/475-3311
Edmond Life & Leisure	news@edmondpaper.com	405/340-3311
The Tribune (Bethany)	news@okctribune.com	405/789-1962
Journal Record	news@journalrecord.com	405/235-3100
Oklahoma Gazette	editor@okgazette.com	405/528-6000
Norman Transcript	editor@normantranscript.com	405/321-1800
Black Chronicle	alindsey@blackchronicle.com	405/424-4695
El Nacional (Hispanic, bilingual)	noticias@elnacionalmedia.com	405/632-4531
OKC Friday	rose@okcfriday.com	405/755-3311
Mustang News	editor@theyukonreview.com	405/354-5264
Mustang Times	mustangtimesnews@sbcglobal.net	405/376-6688

Continued on back

Yukon Review	editor@theyukonreview.com	405/354-5264
City Sentinel (central OKC)	news@city-sentinel.com	405/834-4834
The Oklahoma City Herald	news@okcherald.org	405/842-7827
Moore American (owned by Norman Transcript)	editor@normantranscript.com	405/321-1800

Television Stations

KFOR-Channel 4 (NBC)	4@kfor.com	405/424-4444
KOCO-Channel 5 (ABC)	newstips@koco.com	405/478-3000
KWTV-Channel 9 (CBS)	newsdesk@news9.net	405/843-6641
KOKH-Channel 25 (Fox)	news@okcfox.com	405/843-2525

Radio Stations with a strong news format

KGOU FM (NPR affiliate at OU)	news@kgou.org	405/325-3388
KOSU FM (NPR affiliate at OSU, located in OKC)	kosu@kosu.org	405/744-6352
KTOK AM	bethmyers@iheartmedia.com	405/840-5271

2. Social Media

Social media is a powerful way to distribute your information and engage audiences in an interactive way. Utilize whatever social media platforms you have to communicate your news to your clients, supporters, board, staff and any interested parties, and be sure to encourage engaged supporters to share the news to organically grow your reach. Don't forget to tag the OCCF so we can share as well! Below, we have included sample posts to spark your creativity.

- a. **Facebook** – We're excited to be planning for our future and want you to be a part of it! We recently established a Charitable Organization Endowment fund [are growing our endowment with a matching campaign] at the [@occf.org](https://www.occf.org) to provide us with a funding base for future years. Find out how you can support the future of *(Your Organization's Name)* at [\(Link to your endowment fund information on your website or your endowment fund page on the OCCF's website\)](#). #GiveForAlltheTomorrows
[Be sure to include an image with the post. It can be a photo representative of your organization or a graphic created.]
- b. **Twitter** - We're planning for our future and want you to be a part of it! We recently established an endowment fund [are growing our endowment with a matching campaign] at the [@occforg](https://www.occf.org) to provide us with a funding base for future years. Find out how you can support the future of *(Your Organization's Name or Twitter handle)* at [\(Link to your endowment fund information on your website or your endowment fund page on the OCCF's website\)](#). #GiveForAlltheTomorrows
[Be sure to include an image with the post. It can be a photo representative of your organization or a graphic created.]
- c. **Instagram** - We're planning for our future and want you to be a part of it!
We recently established an endowment fund [are growing our endowment with a matching campaign] at the [@occforg](https://www.occf.org) to provide us with a funding base for future years and are excited to be on the road to be supporting the needy families for years to come *(or more fitting phrasing for your organization)*. #OKC4Good #okcnonprofits
[Be sure to include an image with the post. It can be a photo representative of your organization or a graphic created.]
 - i. Instagram stories are a great way to help followers see your posts and allow you to tell a little more about your mission. We encourage you to share about information as both a post and story!

3. Newsletters and Mailers

Sharing about your endowment fund doesn't mean you have to create something new. Simply begin sharing the information where you are already communicating with donors and clients. Include blurbs and did-you-know sections in your newsletters, and maybe consider a breakdown of how an endowment fund works in one of your larger publications. Consistent education is your friend here. Make sure you are talking about your endowment fund whenever possible because long-term growth comes in baby steps.

4. Website

Did we mention it's important to make this information accessible at all times? The OCCF allows your donors to contribute directly to your fund online. You can link to our online giving page [\[donate.occf.org\]](https://www.occf.org/donate-occf.org) or direct donors to your GiveSmartOKC profile from which they can donate directly.

ANNOUNCING A FUND OR CAMPAIGN

Media Information

NEWS RELEASE

For Immediate Release – DATE YOU ARE SENDING RELEASE OUT

Contact: *(Include the first and last name of grant contact, telephone number and email address.)*

(Organization name) uses endowment at Community Foundation to grow perpetual support

Oklahoma City, OK (or appropriate locale) – (Organization name) is pleased to announce it has established an endowment fund at the Oklahoma City Community Foundation to support the **(organization name)**'s mission in perpetuity. The invested endowment fund is a permanent fund that awards grants back to our organization each year to support **(insert information about what your organization is using the fund to support)**. The fund ensures the organization will have a permanent source of funding every year.

(Insert a compelling quote from the organization's leadership to help reinforce the importance of the fund for your organization)

"We are thrilled to have the opportunity to establish an endowment fund," says the organization's executive director/board president. "The fund adds necessary financial support for our organization. Because of its permanence, we know we will receive annual distributions from the fund, which is vital for our organization to carry out our mission."

(Insert a paragraph describing how the endowment fund came to be.)

Donations can be made to the fund through the Oklahoma City Community Foundation and currently will be matched by a grant from the Kirkpatrick Family Fund. The Foundation is able to accept gifts of cash as well as complex assets, cryptocurrency, oil and gas interests and real estate. To learn more on how you can support the **(organization name)**'s endowment fund, contact **(your organization's contact information)** or the Oklahoma City Community Foundation at (405) 235-5603.

Founded in 1969, the Oklahoma City Community Foundation is a 501(c)(3) public charity that works with donors to create charitable funds that will benefit our community both now and in the future. An initiative of the Oklahoma City Community Foundation Trustees, the iFund grant program utilizes gifts from donors to support services for children and elderly, as well as provide access to health care. To learn more about the Oklahoma City Community Foundation, visit www.occf.org. ***(This is a mandatory paragraph.)***

-30-

(The -30- is important because it lets the media know that this is the end of the release.)

MARKETING PLANNED GIVING

January
to March

Gifts Through Wills and Trusts

Leading up to tax filing season, encourage individuals to update their existing will or trust or create a new one. Promote the simplicity of making a gift to your organization through a will or trust.

Sample message: "What legacy will you leave? Consider leaving a gift to **[organization name]** in your will or trust. Contact us to learn more."

April
to June

Charitable Gift Annuities

After filing taxes, many people are thinking about their current financial situation and how to lessen their tax liability in the coming years. A CGA gift is an easy way for individuals to reduce their taxes and receive a guaranteed income stream for life, while also supporting their favorite charity. Remember, OCCF can underwrite these for you.

Sample message: "Make a gift to **[organization name]** in exchange for a guaranteed income stream for life, plus receive a charitable income tax deduction."

July
to August

Gifts Through Wills and Trusts

A gift through a will or trust is the easiest gift for a donor to make through their estate. If you don't want to get into the more complicated planned gifts, it's always simple to promote these estate gifts. Also, don't forget to inform donors they can gift retirement plan assets to benefit your organization directly as a beneficiary on their retirement account.

Sample message: "Did you know you can make a gift to **[organization name]** by including us as a beneficiary of your retirement plan? It's a simple, tax-wise way to leave a legacy. Contact us to learn how."

September
to October

IRA Charitable Rollover

Even though the age to take a required distribution has been raised to 72, if you are 70½ you can still make a qualified charitable distribution (QCD) from your traditional IRA. As the end of the year approaches, many individuals are realizing they don't need this extra income and they don't want to pay the taxes on the distribution. If they don't take the distribution, they will pay a penalty. A solution to this is the IRA Charitable Rollover allowing them to gift up to \$100,000 per year to your endowment or directly to your organization, satisfy their required minimum distribution and avoid potential taxes on the distribution.

Sample message: "Are you age 70½ or older? We can help you make a tax-free gift from your IRA to support **[organization name]**. Contact us to learn more."

November
to December

Year-end Giving

During your year-end giving appeal, don't forget to offer planned giving options. This is another great option to include when people are in the giving spirit and also thinking about closing out the tax year. By working with the Oklahoma City Community Foundation, you can offer donors efficient giving options that can lower their taxable income while supporting your organization's endowment.

Sample message: "As the year draws to a close, are you looking for ways to give back while also saving on taxes? Contact us to learn more."

DID YOU KNOW?

1 You can avoid capital gains tax on highly appreciated assets.

By donating a highly appreciated asset to the Oklahoma City Community Foundation, you can avoid paying capital gains on that asset. The Community Foundation is able to sell the asset and avoid any capital gains tax.

2 You can leave a bequest to charity without changing your will or trust by making a beneficiary form change on any retirement plan including an IRA, annuity, 401k, 403b or life insurance policy.

Just list your favorite charity(s) as primary beneficiaries and what amount or percentage you are interested in gifting. You can also list a charity(s) as a contingent "beneficiary" in the event that none of your primary beneficiaries are living at time of your death.

3 You can transfer your house or other personal property to charity without changing your will or trust.

By using a transfer on death deed, you may record (file) the deed with the local land records office before your death, but you are free to change your mind and revoke the deed at any time during your life. Upon death it will go to charity.

4 You could avoid paying income tax on your required minimum distribution (RMD) from your traditional individual retirement account (IRA).

"How?" you ask....by making a qualified charitable distribution (QCD) from your IRA to a charitable organization endowment at the Oklahoma City Community Foundation! By doing so, you can make a contribution to charity, avoid taxation on the withdrawal from the IRA and satisfy your RMD requirements. This can be done with a portion or all of the RMD.

5 The most tax efficient way to leave a charitable gift from your estate is through a retirement account.

By naming the Oklahoma City Community Foundation as one of the beneficiaries of your retirement plan, the gift will be tax-free.

If you are subject to estate tax, your estate will also receive a charitable deduction to offset potential liabilities. Simply request a beneficiary designation form from your retirement plan administrator and list the Oklahoma City Community Foundation as a primary or contingent beneficiary. Make sure you communicate your intent of a gift to the executor of your estate as well as to the Community Foundation.

6 You can name the Oklahoma City Community Foundation as a partial or full beneficiary on any of your retirement funds or life insurance policies.

It's as simple as requesting a beneficiary designation change form from your financial institution, including the Community Foundation as a beneficiary alongside any other heirs and returning the form to the financial firm for processing, before your death, but you are free to change your mind and revoke the designation at any time during your life. Upon death it will go to charity.

7 You can have a powerful impact on society with one simple sentence.

By making a provision in your will or trust to leave a gift to the Oklahoma City Community Foundation, you can provide a lasting gift to support charities for generations to come. That provision can be a specific dollar amount, percentage of an estate or remainder of an estate after all debts have been paid.

DID YOU KNOW?

8 You could make a gift to the Oklahoma City Community Foundation in exchange for a guaranteed lifetime income stream.

Simply make a gift of cash, stocks, bonds or even real estate to the Community Foundation in exchange for a charitable gift annuity. You receive an immediate charitable income deduction, guaranteed lifetime income, and any funds left in the annuity upon your passing transfer to support charitable causes you designate.

9 Congress passed the Setting Every Community Up for Retirement Enhancement (SECURE) Act on December 19, 2019.

The SECURE Act includes many provisions designed to facilitate and enhance saving for retirement, but no longer allows non-spouse beneficiaries of IRAs to take a distribution over their life expectancy. Instead, the new law requires the funds be paid out over a maximum period of 10 years. (Exceptions: minors and individuals who are within 10 years of the age of the IRA owner.) For those interested in providing support beyond the 10-year time frame and seeking to support charitable causes, a charitable remainder trust is the perfect answer. You can stretch the beneficiary payments over the life of the beneficiary and whatever is left in the trust at the end of their life will pass to the Community Foundation.

10 You could gift your house to the Oklahoma City Community Foundation while still living there and receive a charitable deduction.

You simply execute a transfer on death deed, giving the Oklahoma City Community Foundation ownership of your house. Once you vacate the property, the Community Foundation has the ability to sell the property and use the funds to support an existing endowment or create a new one to benefit your favorite charity(s). The advantage is that you receive an immediate income tax deduction, relieve your heirs from the burden of selling the property and, for large estates, could eliminate or reduce taxes because the value of the property is removed from the estate. It's called a retained life estate gift. After you and your named beneficiaries no longer have use for the property, the foundation will liquidate and place the funds into a charitable fund.

11 You can assign a certificate of deposit (CD), money market account, checking account or savings account to charity without changing your will or trust.

Through a transfer on death or payable on death beneficiary form, which can be found at your bank, you can list your favorite charity as the beneficiary of these funds.

12 If you are considering liquidating a business or real estate holdings, there is a way to transfer a portion if not all to a trust held at the Oklahoma City Community Foundation that may eliminate the capital gains tax due.

By using a charitable remainder trust (CRT), you can transfer a portion or all of the interest to the trust, receive a charitable deduction and an income stream. Then, whatever is remaining in the trust at the end of the trust's life cycle will go to charity.

13 That you could make a gift to the Oklahoma City Community Foundation, receive a charitable deduction, and then at some point whatever is left in the trust can be returned to you.

It's true, a Grantor Charitable Lead Trust allows you to establish a trust, select a period of years for charitable distributions to be made, receive a charitable deduction for the net present value of the distributions to charity and then at the end of the trust term whatever amount is left is returned to you.