

AT THE HEART OF PLANNED GIVING



TULSA COMMUNITY
FOUNDATION

Your Values. Your Legacy. Your Community.





TULSA COMMUNITY FOUNDATION

Tulsa Community Foundation (TCF) was founded in late 1998 and exists to make charitable giving more meaningful and efficient. Hundreds of individuals and corporations make all their contributions to charities through TCF's services. TCF's donors and the charitable nature of Tulsans have made TCF the largest community foundation in America.

Donors give cash or appreciated assets to TCF and create individual funds in their names. Donors receive an immediate tax deduction and one receipt from TCF, then advise when those assets are given to charities they choose. TCF reviews each recommendation and approved grants are made to charities, in the name of the donor's fund, in Oklahoma, America and internationally. TCF handles all accounting, reporting, investing and grantmaking.

TCF helps educate donors on the community's highest needs, creates focused charitable giving strategies for donors, and works to involve children and other family members in multi-generational giving. TCF hosts programs that inform donors across the community about planned giving opportunities – using wealth, rather than current assets, to fund charitable activities. These programs allow donors to maximize what they leave to their families and to charity.

Please consider how you can use TCF's services to better accomplish your charitable objectives and make a more lasting impact on our community.



AN OVERVIEW OF TOOLS & BENEFITS

Planned giving is more than a transfer of one's assets: it is the transfer of your heart and the values by which you have lived. The giving strategies listed within this brochure are a few of the tools and techniques that can provide the way to make your legacy come to life, and transfer your heart's passion to the charitable causes that have impacted you the most.

A close-up photograph of two hands, palms facing each other, with fingers curled to form a heart shape. The hands are positioned centrally against a solid orange background. The text 'YOUR HEART & VALUES' is superimposed in the center of the heart shape. The text is in a bold, sans-serif font, with 'YOUR' in a smaller size above 'HEART &', and 'VALUES' in a large size below it. The ampersand is stylized and large, connecting 'HEART' and 'VALUES'.

YOUR
HEART &
VALUES

PLANNING TOOL

WHAT IS IT?

YOUR BENEFITS

Will

A legal document outlining how you want your assets distributed when you die.

Selects guardians for your children
Directs assets to beneficiaries

Revocable Living Trust

A trust that holds property for your benefit and then avoids probate at your death.

Avoids probate and guardianship for disability
Directs assets to beneficiaries
Provides for disabled children and estate tax savings
Controls timing and amount of distribution to beneficiaries

Charitable Gift Annuity

A contract in which a charity pays you income payments based upon your age and the amount of your gift.

Increases current income
Creates income tax deduction
Avoids capital gains tax

Charitable Remainder Trust

A trust that pays you income before charity receives the remainder.

Increases current income
Creates income tax deduction
Avoids capital gains tax
Eliminates income tax on retirement plans at death

Charitable Lead Trust

A trust that pays charity an income before you or your heirs receive the remainder.

Creates income tax deduction
Eliminates federal estate tax

Life Estate

A gift of real estate that allows you to keep the rights of ownership; the property is distributed to charity at your death.

Creates income tax deduction
Retain your right to live in the property during your life

Outright Gifts of Assets

Any gift given to charity such as cash, stocks, bonds, real estate, art, antiques, or life insurance.

Creates income tax deduction
Eliminates capital gains tax
Eliminates estate tax
Tailors gifts to charity's current needs



TULSA COMMUNITY FOUNDATION

To learn more about how Tulsa Community Foundation can assist you to simplify, streamline and maximize your charitable giving, please contact:

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