Your Legacy Guide

Leaving a Legacy Through Your Will or Trust
Including a charitable gift in your will or trust is a meaningful way to support the causes you care about, often more straightforward than people expect. TCF makes the process simple, guiding you every step of the way with expert support and a proven approach.

How We Help You Create Your Giving Plan
Our team works closely with you and your professional advisors to design a plan that reflects your values and ensures your charitable wishes are honored. Here's what the process looks like:

1. **Clarify Your Giving Goals**
   We start by learning what matters most to you and helping you shape a charitable vision that reflects your legacy.

2. **Put Your Plan in Writing**
   Once your goals are clear, we collaborate with your advisors to document your intentions, so your giving plan is clear, thorough, and ready to be carried out in the future by establishing a TCF charitable fund agreement. This agreement can easily be updated during the donor's lifetime.

3. **Receive and Manage Your Charitable Gifts**
   After your lifetime, we work with your estate to receive the gifts you've designated – whether from your will, trust, or retirement accounts – and place them in your charitable fund. This simplifies the estate process by gathering all your charitable gifts into one place.

4. **Distribute Grants to the Causes You Care About**
   Finally, we manage the grantmaking from your fund, ensuring your gifts are distributed exactly as you intended to the nonprofits and causes you chose.

A Trusted Partner in Your Charitable Legacy
With decades of experience, the TCF team ensures your charitable legacy is carried out efficiently and thoughtfully, so your generosity continues to make a difference for years to come.

Questions? We're here to help.
Contact us at 918-494-8823 or donorserv@tulsacf.org to learn more about ways to give or if you need more detailed information.