

Who should consider an advised fund at the Oklahoma City Community Foundation?

Individuals and families who have broad charitable interests and are looking for a convenient and cost-effective way to recommend grants to support these interests.

Can I establish an advised fund with a gift of appreciated stock?

Yes! By making a gift of appreciated stock you can establish an advised fund, avoid capital gains taxes on the appreciated amount and recommend grants at any time.

Is an advised fund a permanent fund?

That depends upon you. We offer the following three advised fund options:

- An Express Fund is established with a minimum gift of \$1,000 and is completely spendable.
- A Gift Fund is established with a minimum gift of \$10,000 and it is also completely spendable and offers additional benefits.
- The Legacy Fund is a permanent endowment fund established with a \$10,000 gift and provides an annual spendable balance.

Why should I establish an advised fund at the Oklahoma City Community Foundation?

- As a 501(c)(3) public charity, we offer the maximum tax benefits available.
- We offer low, competitive fees.
- Avoid the compliance and administrative burdens of operating a private foundation.
- We are able to accept a wide variety of gifts including cash, appreciated stocks (including mutual funds and other marketable securities), real estate, life insurance policies, retirement plan assets, closely-held stocks and oil and gas royalties.
- Our professional staff provides expertise on local, regional and national charitable giving.



Please contact us at 405/235-5603 for more information or visit www.occf.org.




**OKLAHOMA CITY
COMMUNITY FOUNDATION**

Helping you help the community

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Is an advised fund in your future?

It can be if you are considering making a charitable gift before the end of the year. The Oklahoma City Community Foundation offers three advised fund options, accepts a variety of gifts (such as appreciated stocks) and, as a 501(c)(3) public charity, we provide the maximum tax benefits available.

Contact us to learn more about our advised fund program. Call 405/235-5603 or visit www.occf.org.

GiveSmartOKC.org



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Confirmed in Compliance with National Standards for U.S. Community Foundations