



ADVISED FUNDS

legacyfund

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expressfund



OKLAHOMA CITY  
COMMUNITY FOUNDATION

*Helping you help the community*

1969-2004  
*Celebrating 35 years*

405 235 5603 fax 405 235 5612

P.O. BOX 1146 73101-1146

1300 N. BROADWAY DR.

OKLAHOMA CITY, OK 73103



Make  
your  
charitable giving  
simple.



expressfund



OKLAHOMA CITY COMMUNITY FOUNDATION

In accepting a contribution to any fund, the Oklahoma City Community Foundation trustees commit to the donor that the contribution will be protected for the charitable purpose originally intended. The variance power, as described in the governing documents of the Oklahoma City Community Foundation, assures donors that if the charitable purpose of their contributions becomes impractical or impossible, the distributions will be directed to similar purposes in the community.

*If you give to charity, the Oklahoma City Community Foundation can make it simple for you. Our Advised Fund Program offers several options such as the Express Fund for individuals, families and businesses who want a simple yet powerful way to support charitable causes. The Express Fund is easy to start, convenient to use and allows you the flexibility of when and where to give.*

## expressfund

The Express Fund is the simplest way to make a gift of stock or other asset in one tax year while deferring the decision on what charity or charities to support. The Oklahoma City Community Foundation takes care of administrative details so you can make a gift with the least amount of hassle and the lowest possible transaction fee.

**An Express Fund is established with a minimum of \$1,000 and offers the following benefits:**

- It's a completely spendable fund.
- No fees are charged and no investment earnings are generated.
- Grants can be recommended at anytime in any amount to any charitable organization.
- Fund balance reports are available.
- Anonymous grant making is available upon request.

For information on how to establish an Express Fund or for more information on our Advised Fund Program, please contact Jennifer Stewart at 405/235-5603.



## Rick Kells

With his Express Fund at the Oklahoma City Community Foundation, tax attorney Rick Kells is putting into practice

the advice he gives clients who are looking to reduce their tax burden on appreciated securities while at the same time benefiting their favorite charities.

“My Express Fund allows me to donate appreciated securities to one tax exempt organization and then simply recommend distribution of grants to the charities I would like to support,” he explains. “The Oklahoma City Community Foundation has the expertise for these types of transactions and the staff is professional and responsive.

“I highly recommend an Express Fund at the Oklahoma City Community Foundation to anyone who wants to receive the double tax benefit of saving taxes on the gain associated with appreciated securities and obtaining a charitable deduction for the full fair market value of the securities,” Kells adds. “It’s a practical and convenient way to make your charitable contributions.”