



**THE FOUNDATION**  
FOR  
OKLAHOMA CITY COMMUNITY COLLEGE

## LEGACY GIVING

There are many ways to describe what we like to call Legacy Giving, such as estate planning or planned giving. Regardless of what you call it, using assets to benefit your family and the organizations important to you can provide benefits now, and at the time the assets pass to your beneficiaries.

A Legacy Gift allows you to make a deep and lasting difference while qualifying for tax savings and other advantages that may actually increase the value of your estate for your heirs. Legacy Gifts take many forms, including gifts in wills or trusts, retirement assets, stocks and life insurance.

Gift planning enables you to make your own choices on how to take care of yourself, your family and the causes that are important to you. Taxes – income, capital gains and estate – may be reduced, or even avoided, by taking advantage of one or more of these giving ideas. Along with your legal and financial advisors, we can help you create ways to pass on your values, as well as your valuables.

The material presented by The Foundation is not offered as legal or tax advice. Please consult your financial advisor or qualified attorney for more information.

## SAMPLE LANGUAGE FOR YOUR WILL OR TRUST

Including the Oklahoma City Community College Foundation in your Will or Trust is one of the easiest ways to create your legacy while supporting the students, faculty, staff or programs of the college. Your attorney or financial advisor will need the following information to properly designate your giving:

**Legal Name:** Oklahoma City Community College Foundation, Inc.

**Federal Tax ID:** 73-1529564

**Address:** 7777 South May Avenue, Oklahoma City, OK 73159

## SAMPLE LANGUAGE FOR A SPECIFIC GIFT

"I give to Oklahoma City Community College Foundation, an Oklahoma nonprofit corporation located in Oklahoma City, Oklahoma (EIN 73-1529564), or its successor organization, (the sum of \$ \_\_\_\_\_) (or \_\_\_\_\_% of my estate), (or other property herein described) for support of its academic mission."

## SAMPLE LANGUAGE FOR A REMAINDER (OR RESIDUAL) GIFT

"I give to Oklahoma City Community College Foundation, an Oklahoma nonprofit corporation located in Oklahoma City, Oklahoma (EIN 73-1529564), or its successor organization, (all or \_\_\_\_\_ % of) the residue or remainder of the property owned by me at death, real and personal and wherever situated, for support of its academic mission."

## SAMPLE LANGUAGE FOR A CONTINGENT GIFT

It is possible that the primary beneficiary or beneficiaries of your estate may pass before you do. In that case, a contingent gift naming Oklahoma City Community College Foundation as an alternate beneficiary can provide a meaningful option.

"In the event (insert the primary beneficiary/beneficiaries) does/do not survive me, I give said amount to Oklahoma City Community College

Foundation, an Oklahoma nonprofit corporation located in Oklahoma City, Oklahoma (EIN 73-1529564), or its successor organization, for support of its academic mission.”

## RESTRICTIONS FOR YOUR GIFT

Please add the following to any of the bequests to direct the gift is used according to your wishes. We will work with you to create a legal document identifying your intentions on how the gift should be used according to your restrictions.

**Unrestricted Gift:** “This gift is unrestricted and may be used for the highest priority need(s).”

**Restricted Gift:** “This gift is to be used for the purposes(s) set forth in a separate written agreement(s) between me and the Oklahoma City Community College Foundation, as may be amended from time to time. If there is no such agreement, the gift is unrestricted.”

## FOUNDATION STAFF

Von Allen, Executive Director and OCCC Chief Development Officer

Chris Collins, Director of Development

Evelyn Schaefer, Director of Annual Giving

### **The Foundation at OCCC**

7777 South May Avenue

Oklahoma City, OK 73159

405.682.7591

[GivetoOCCC.org](http://GivetoOCCC.org)