



OKLAHOMA CITY  
COMMUNITY FOUNDATION

**Make a Difference**

**Create  
an Impact**



# Simple. Effective. Forever.

The mission of the Oklahoma City Community Foundation, a nonprofit public charity, is to serve the charitable purposes of its donors and the charitable needs of the Oklahoma City area through the development and administration of endowment and other charitable funds with the goal of preserving capital and enhancing value.

*COVER & FOLLOWING PAGES:*  
Will Rogers Park, Oklahoma City

## At the Foundation, It's Our Mission to Help You...

### Make an Impact

The expert team at the Oklahoma City Community Foundation can help you make the greatest impact on the most pressing needs in our community. Our knowledgeable staff and leadership have created programs and initiatives that, with your generous support, can transform lives in central Oklahoma and beyond.

### Support Community Nonprofits

The Charitable Organization Endowment program is one of the oldest programs at the Oklahoma City Community Foundation and one of the largest in the nation. The program has more than a thousand permanently invested funds representing hundreds of charitable organizations. Our investment strategy for these funds is strong, and each year, the charitable organizations receive a distribution from the fund, ensuring income is available to support their mission even when times are tough. You can choose to support a preexisting fund or create your own fund in support of your favorite qualified organization.

### Beautify Public Lands

Thirty years ago, Margaret Annis Boys had a dream to beautify her community. She left a gift in her will that would eventually create the Parks & Public Space Initiative at the Community Foundation. Through grants, this initiative has now invested millions of dollars to enhance parks and public spaces in central Oklahoma, encouraging local residents to stay active and enjoy public green spaces. Use your gifts to directly support the Initiative or create a field of interest fund to support community beautification projects.

### Help Students with Their Education

Create your own scholarship or add to an existing fund to encourage students to pursue higher education while fueling your passion or honoring a friend or family member. Through funds created by generous donors, the Oklahoma City Community Foundation has become the largest independent scholarship provider in Oklahoma, awarding more than \$2 million to over 800 students across the state each year.

### Meet Needs in the Community

As signature programs of the Community Foundation, the iFunds award annual grants to increase access to health care, provide opportunities for underserved children and keep older adults living independently in their own homes. Your generous support of these programs can help add to our annual amount awarded. Or, you can create your own field of interest fund to support a cause dear to you.

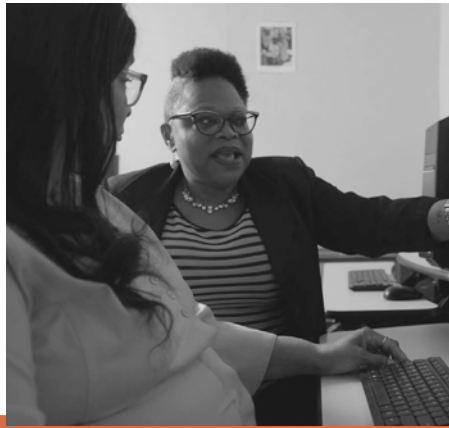
### Give Smarter

GiveSmartOKC.org is a free resource provided by the Community Foundation for donors to learn more. Use the online database to search for causes or charities you might like to support or use U.S. Census data overlay to learn what areas of the community have a specific need.

Call our staff at **405/235-5603**  
to learn more about opportunities  
where you can make an impact.



# How Do We Foster Greater Giving?



## Local Expertise

Our staff shares in-depth knowledge of the issues, opportunities and resources that shape our community. We work closely with organizations in all areas of community need, including social services, education, health care, arts, beautification and the environment. We can help you learn more about local organizations and programs that make a difference in the areas you care about most.

## Community Leadership

We are invested in the future of our community. By bringing resources, people and organizations together to address local issues and opportunities, we continually strive to meet the changing needs of the community.

## Power of Endowment

If you choose one of our permanent endowment fund options, your fund will be invested with other charitable funds, allowing us to manage funds effectively and ultimately provide better opportunity for sustained growth. Through the power of endowment, our distribution policy and sound investment strategies, your fund will continue to support your charitable interests for generations to come.

## Personalized Service

We make giving simple and effective, accepting a wide variety of gifts and providing a number of giving options customized to meet your charitable goals. As a 501(c)(3) public charity, all gifts to the funds we administer receive the maximum tax benefits allowed.

## Choose What to Give

Nearly any asset can be converted into cash for charitable purposes, often with tax saving benefits. Whether you are planning your estate, succession or business sale, or year-end gifting strategies, we can assist you in limiting your tax liability relating to capital gains.

- **Cash Gifts**  
Cash contributions may be in the form of cash, check, money order or cashier's check, and mailed to:  
Oklahoma City Community Foundation, PO Box 1146, Oklahoma City, OK 73101-1146
- **Credit Cards**  
Visit [donate.occf.org](https://donate.occf.org) for secure online giving. Give one time, or set up recurring gifts.
- **Cryptocurrency**  
Donating cryptocurrency directly to a 501(c)(3) nonprofit is more tax efficient and can save you money.
- **IRA Charitable Rollover**  
Even though required minimum distributions from a traditional IRA do not start until age 72, you can begin making charitable distributions up to \$100,000 at 70 1/2.
- **Real Estate**  
Land, vacation homes, commercial properties and primary residences offer a variety of gifting opportunities.
- **Securities**  
Stock, bonds and mutual funds are a very effective asset to gift.
- **Business-related Assets**  
Gifting a portion or all of a privately held C-Corp, S-Corp, LLC or limited partnership can be an efficient tax planning strategy.
- **Retirement Plan Assets**  
Naming OCCF as a beneficiary of a 401(k), 403(b), traditional IRA, SEP or any other type of qualified retirement plan can be the most tax-efficient asset to gift at death.
- **Life Insurance**  
Gift a fully-funded policy during lifetime or name OCCF as a beneficiary.
- **Other Assets**  
Copyrights, royalties, art, gold, coins, patents and oil and gas interests.

## When to Give

Take advantage of a number of gift planning tools offered. The experienced staff at the OCCF will work with you and your team of advisors to include a charitable gift from your family, business or estate plan.

- **Bequest**  
The most popular type of planned gift whereas a provision is made in a will or trust to gift a portion if not all of an estate for the benefit of a fund or to establish a fund.
- **Termination of a Private Foundation**  
If you are tired of keeping up with the compliance and administrative duties of running a private foundation, consider converting to a fund at the OCCF.
- **Charitable Gift Annuity**  
Make a tax-deductible gift now in exchange for a lifetime income stream with the remainder going to a fund at a later date.
- **Charitable Remainder Trust**  
Use this tax strategy to minimize tax consequences on highly appreciated assets while still receiving an income stream for life or a stated period of time with the principal going to a fund at the OCCF.
- **Charitable Lead Trust**  
This can be used to generate a charitable deduction upon receiving a windfall or used as an estate planning tool to minimize estate taxes. After the trust term ends, the remainder returns to either the donor or family, depending on the type of trust.

Oklahoma City  
Community Foundation  
Tax ID EIN: 23-7024262





*Dortha Dever*

A graduate of Oklahoma City University, Dortha Dever believed her education was the catalyst for a long and successful banking career. After retiring as an assistant vice president of American Fidelity, she felt it was time to give back. Together with the Oklahoma City Community Foundation, she established the Dortha Dever Legacy Fund to provide perpetual distributions to her favorite charities including Oklahoma Medical Research Foundation for Cancer Research, Habitat for Humanity and the Elderly Services iFund grant program. She also created a scholarship for the Oklahoma City University business school.

DONOR ADVISED

# Legacy Fund

A charitable fund that allows donors to leave a legacy by endowing their gifts for the benefit of one or more charitable organizations.

## AT A GLANCE

- Create a legacy of support for your favorite causes.
- Avoid administrative annoyances of charitable giving—keeping up with canceled checks and gift receipts.
- Support organizations today and tomorrow.
- Excellent estate planning tool.
- Great alternative to a private foundation.



DONOR ADVISED

# Gift Fund

A gift fund organizes all of your giving through one efficient and effective vehicle. You choose which organizations to support, how much to distribute and when. If you want ideas and advice, our donor services team will provide answers to your questions.

## AT A GLANCE

- Simple and easy.
- Manage all of your giving from one account.
- Give to multiple organizations and programs throughout the year.
- Involve your children or family in your charitable giving.
- Excellent tax planning tool.

Photo: Regional Food Bank of Oklahoma



*Herb & Marynm  
Martin*

“ The flexibility of a Donor Advised Fund and the simplicity of it is what attracted us to do this... ”

— Herb Martin

Herb Martin enjoyed a successful 35-year career working as a geologist in the oil and gas industry. He and his wife, Marynm, always had a heart for giving, and through the recommendation of a financial advisor, the Martin's were introduced to the Oklahoma City Community Foundation where they established a Donor Advised Gift Fund. This allowed them to support their favorite nonprofits and organizations throughout the year, such as educational causes and organizations that help feed the hungry.





Lillian Meador

“ This is such an exciting way that we can accomplish Mr. Meador’s wishes and carry out his legacy...

...That is really what it’s all about: ensuring the charitable gifts he left continue to make an impact long after he is gone.” — Nancy Anthony, OCCF President

In 1995, Ralph Meador first sent a letter to Nancy Anthony, president of the Community Foundation. Ralph, an Ohio resident, explained to Nancy that his mother, Lillian, had lived in Oklahoma her entire life and was a successful gardener with a love for spring-flowering bulbs. In 1996, Ralph created the Lillian Frances Watts Meador Fund, a Field of Interest Fund at the Community Foundation, to support the planting of hyacinth bulbs throughout the community. The Community Foundation is continuing to keep Ralph’s dream of a beautiful community alive through Rebloom Oklahoma, a bulb-planting initiative that launched in 2020. In the program’s inaugural year, 57,950 daffodil bulbs were planted in 134 neighborhoods, parks, streets, schools, churches and libraries in Oklahoma County.



# Field of Interest Funds

A Field of Interest Fund is a permanent endowment fund that offers you the opportunity to support evolving needs in the community as well as a variety of nonprofits where you are passionate. Examples of Field of Interest Funds include social services, elderly support, education, health care, animal welfare, beautification and geographic areas.

## AT A GLANCE

- Provide support for a specific area of interest.
- A committee made up of community leaders and experts in the field will review and select organizations that most closely align with your interests.
- Meet the ever-changing needs of a community based on your criteria.
- Excellent tool to ensure your passion is carried out for generations.



# Scholarship Funds

An endowed Scholarship Fund provides an ideal way to help students achieve their educational goals. Depending on the size of your gift, our staff can assist you in determining the scholarship guidelines, including eligibility criteria, award amount and selection committee.

## AT A GLANCE

- Support educational opportunities, a specific educational institution or a course of study.
- Honor or memorialize a loved one.
- Build a legacy of creating pathways to success for others.
- Invest in the future of our youth.

Photo: OCCF Scholarship recipients



“ We’re not rich or anything like that, but we can get things done. ”

— Roy Thornton

Roy & Darlene Thornton

Lifetime Mid-Del residents Roy and Darlene Thornton wanted to give back to their community by helping local students get to college. They established the Roy Edward Thornton & Darlene Young Thornton Scholarship at the Oklahoma City Community Foundation to benefit local students committed to community service. The fund they started in 2013 has grown from two students receiving a \$1,000 scholarship to six students receiving more than \$2,000 each year. And it all started because people like Roy and Darlene understand that no matter what size donation you make, you can always make a difference.



# Family Affiliated Funds

Family Affiliated Funds are a convenient alternative to a private foundation, offering fewer restrictions and administrative responsibilities as well as favorable tax treatment. Each Family Affiliated Fund has its own trustees, operates under its own set of governing documents and is considered a supporting organization of the Oklahoma City Community Foundation.

## AT A GLANCE

- Alternative to a private foundation.
- Utilize Community Foundation staff for all administrative duties and compliance issues.
- Flexible investment options.
- Establish your own distribution policy.

Photo: Teachers were able to explore their passion for the arts with the help of scholarships from the Albers Family Affiliated Fund.



“ The administrative support and counsel of the Oklahoma City Community Foundation allows us to focus on philanthropy instead of getting caught up in accounting, researching and tax reporting. ”

— Leigh Ann Albers



Paul & Leigh Ann Albers

After the sale of their company, Paul and Leigh Ann Albers were looking for a way to use the sale's assets to give back to the community. Rather than take on the responsibility of managing a private foundation, they decided to establish a Family Affiliated Fund at the Community Foundation and found a way to make a difference. Through their fund, they have focused their giving and evolved into community leaders supporting at-risk children and the arts. Since 2008, they have supported scholarships for public school educators attending the Oklahoma Fall Arts Institute, providing teachers the opportunity to enhance their skills and become better arts educators for their students.



Let us help you create  
your legacy.



405-235-5603

*[occf.org/fundoptions](http://occf.org/fundoptions)*



OKLAHOMA CITY  
COMMUNITY FOUNDATION

Simple. Effective. Forever.

PO Box 1146 · Oklahoma City, OK 73101  
1000 N. Broadway Ave. · Oklahoma City, OK 73102 · 405-235-5603 · [occf.org](http://occf.org)