

# PLANNED GIVING

*Create a giving legacy that lasts beyond your lifetime.*

## CHARITABLE GIFT ANNUITY

### RECEIVE ANNUAL INCOME WHILE SUPPORTING THE CAUSES YOU CARE MOST ABOUT

- We create a contract with you that combines immediate annuity payments for you or other specified beneficiaries with a deferred charitable gift.
- Receive periodic income that is fixed, regardless of marketing conditions.
- Upon the donor's death, any remaining funds are either:
  - Deposited into an account that resides at the Omaha Community Foundation designed to accomplish your specific objectives.
  - Granted directly to pre-designated charities you select.
- We handle all of the administrative details.

### GIVE WITH FLEXIBILITY

- Make a gift to the Omaha Community Foundation of at least \$10,000. Donate cash, appreciated stocks or other assets.
- Receive an immediate tax deduction on the charitable portion of your gift.
- Customize the annuity payment to benefit a loved one or defer them to increase your charitable income tax deduction
- A Charitable Gift Annuity reduces estate assets and may reduce estate taxes.

### GIVE WITH CONFIDENCE

- Take advantage of our philanthropic services. Tell us what you want to accomplish, or what you care about, and we'll help you focus your resources to make the most impact.
- Keep updated on local, regional, or national news that's relevant to your interests and passion.

FOR MORE INFORMATION, CONTACT US AT [GIVING@OMAHAFUNDATION.ORG](mailto:giving@omahafoundation.org) OR (402) 342-3458.



Omaha Community  
Foundation

**Let good grow.**

*Simplify your giving.*



## NOTES

*\*The amount of annuity paid and the tax deduction received depends on the age of the recipient and the current annuity rate (as established by the American Council of Gift Annuities).*

*\*The annual income paid is backed by the general assets of the Omaha Community Foundation.*

*\*Upon the donor(s) death, if proceeds are granted directly to a charity, a one-time administrative levy of 5% of the distribution will be assessed and deposited in the OCF administrative endowment.*