

PLANNED GIVING

Create a giving legacy that lasts beyond your lifetime.

GIFTS BY WILL OR TRUST

Making provisions in your will or living trust is one of the easiest ways to make a future gift to our community and leave a meaningful legacy. You retain control and full use of your assets during your lifetime while still supporting the organizations that matter most to you. We will work with you to customize an account and ensure your intentions are carried out.

- The language used in a will or living trust that establishes your gift to the Omaha Community Foundation depends on your unique circumstances and charitable objectives. You may specify gifts in the form of cash, securities or other property.
- You may choose to donate a specific dollar amount, a percentage of your estate or the residual of your estate.
- Your estate will qualify for a charitable deduction for the full donation, so heirs will not pay estate tax on these assets.
- Our professionals will help you to determine the right account at the Omaha Community Foundation that supports your will or living trust and overall intent of the gift.

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.

SAMPLE LANGUAGE FOR GIFTS BY WILL OR TRUST

To eliminate any possible confusion, you may wish to include the Omaha Community Foundation's Tax ID number 47-0645958.

Unrestricted general legacy	<i>"I give to the Omaha Community Foundation, of Omaha, Nebraska, an amount equal to ___ per cent (___%) of my adjusted gross estate as finally determined for federal tax purposes."</i>
Amount of gift dependent on size of the estate	<i>"I give to the Omaha Community Foundation, of Omaha, Nebraska, an amount equal to ___ per cent (___%) of my adjusted gross estate as finally determined for federal tax purposes, or ___dollars (\$___), whichever is larger."</i>
Gift of residuary estate	<i>"I give the residue of the property owned by me at the time of my death, real and personal and wherever situate, to the Omaha Community Foundation, of Omaha, Nebraska."</i>
Gift for a specific purpose	<i>"I give to the Omaha Community Foundation, of Omaha, Nebraska, an amount equal to ___ per cent (___%) of my adjusted gross estate as finally determined for federal estate tax purposes. This amount shall be for [a specific account] and is to be administered under the terms of an agreement I have on file with the OCF." "I give to the Omaha Community Foundation, of Omaha, Nebraska, an amount equal to ___per cent (___%) of my adjusted gross estate as finally determined for federal estate tax purposes. This amount shall be for the Fund for Omaha."</i>
Specific legacy	<i>"I give my collection of [photographs, books, and paintings related to Great Plains history] to the Omaha Community Foundation, of Omaha, Nebraska."</i>
Contingent gift of residuary estate	<i>"I give the residue of the property owned by me at my death, real and personal and wherever situate, to my [son] _____ if [he] survives me. If [he] does not survive me, I give my residuary estate to the Omaha Community Foundation, of Omaha, Nebraska."</i>
Provision allowing for both income tax and estate tax benefits	<i>"I instruct that all of my charitable gifts, bequests, and devises shall be made, to the extent possible, from property that constitutes "income in respect of a decedent" as that term is defined in the Internal Revenue Code."</i>
Provision for life payments for a survivor, then a residual amount to OCF	The OCF will be pleased to discuss such a provision with you and your attorney.

FOR MORE INFORMATION, VISIT OMAHAFUNDATION.ORG.