

# LEGACY GIVING

*Giving that lasts beyond your lifetime.*

## LEGACY PLANNING — SECURING YOUR VISION FOR THE FUTURE

- Create a lasting legacy for the public good
- Ensure that your charitable wishes are honored
- Structure a philanthropic vision that involves your family members
- Create a plan that utilizes financial, tax, and estate planning benefits

The Omaha Community Foundation offers a full range of legacy giving techniques to assist you. We encourage you to work with your estate planning professional or tax advisor to determine the type of gift that is right for you and your family.

## CHOOSING A FUNDING METHOD THAT WORKS BEST FOR YOU

- **Giving by Wills or Trust** — Name the Omaha Community Foundation in your will or trust and work with us to craft your legacy.
- **Charitable Remainder Trust** — Receive an annual income and immediate tax benefits while making provisions for causes that matter to you.
- **Charitable Lead Trust** — Qualify for generous estate and gift tax deductions for wealth eventually transferred to family by first benefitting the causes you care about most.
- **Life Insurance Beneficiary Designation** — Name the Omaha Community Foundation as the owner and a beneficiary of a life insurance policy.
- **IRA Beneficiary Designation** — Name the Omaha Community Foundation as a primary or contingent beneficiary of all or a portion of an individual retirement account.

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



Omaha Community  
Foundation

**Let good grow.**

*Simplify your giving.*

## DEFINING YOUR LEGACY AND CHARITABLE INTENTIONS

- Take advantage of the Foundation's philanthropic services to identify your wishes.
- Establish the longevity of the legacy you are seeking to create (*indefinite, sunset, pass-through*).
- Choose a charitable account that best meets your needs:
  - **Testamentary Donor Advised Fund** — This account allows successors chosen by you to advise grants from the account.
  - **Testamentary Designated Fund** — This account allows you to pre-designate one or more charities of your choice to receive an annual gift.
  - **Testamentary Field of Interest Fund** — This account allows you to define a specific interest area, cause, or issue to support past your lifetime without limiting gifts to a specific charity.
  - **Support the community through the Omaha Community Foundation** — An account established in your name benefits the Fund for Omaha, the Let Good Grow Fund, or the Omaha Community Foundation Endowment.

*If you have already included the Omaha Community Foundation in your estate plans, but would like to formalize your intentions, we would be happy to meet with you at any time.*

FOR MORE INFORMATION, VISIT [OMAHAFUNDATION.ORG](http://OMAHAFUNDATION.ORG).