LEGACY GIVING

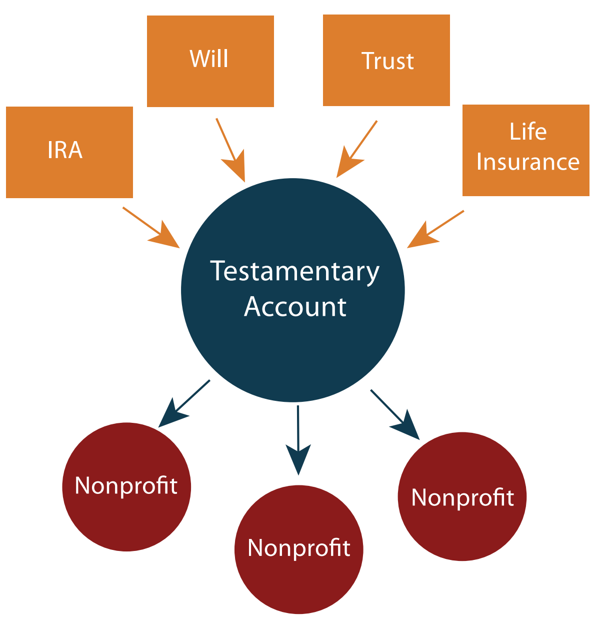
Giving that lasts beyond a lifetime.

At the Omaha Community Foundation, we're honored to help your clients establish charitable legacies — opportunities to keep doing good and supporting their charitable interests, even after their lifetime.

Collaborating with professional advisors, we help determine what kind of gift is right for each donor. We involve family members in the creation of a philanthropic strategy while utilizing financial, tax, and estate planning benefits to create a unified vision for the future.

FUNDING OPTIONS FOR YOUR CLIENTS

- **Giving by Wills or Trust** — Name the Omaha Community Foundation in a will or trust and work with us to craft their legacy.
- **Charitable Remainder Trust** — Clients receive an annual income and immediate tax benefits while making provisions for causes that matter to them.
- **Charitable Lead Trust** — Clients qualify for generous estate and gift tax deductions for wealth eventually transferred to family by first benefitting the causes they 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.



Omaha Community Foundation

Let good grow.

Simplify your client's giving.

DEFINING LEGACY AND CHARITABLE INTENTIONS

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

LEARN MORE

Discover how the Omaha Community Foundation can help your clients craft their legacy.

- Schedule a meeting with a member of the Donor Services team.
- Arrange for a presentation by our Donor Services team at your firm.
- Request an illustration of the giving vehicles best suited to meet your clients' needs and goals.

FOR MORE INFORMATION, CONTACT US AT GIVING@OMAHAFOUNDATION.ORG
OR (402) 342-3458.