



## Securing your vision for the future.

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.

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### Legacy planning.

- Create a lasting legacy for 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

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### Testamentary Fund options.

- Testamentary Donor Advised Fund—this Fund allows successors chosen by you to advise grants from the account.
- Testamentary Designated Fund—this Fund allows you to pre-designate one or more charities of your choice to receive an annual gift.
- Testamentary Field of Interest Fund—this Fund 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—a Fund established in your name benefits the Fund for Omaha, the Let Good Grow Fund, or the Omaha Community Foundation Endowment.

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### Fund structures.

Types of available Fund structures:

- Endowed—allows 4.5% of the fund's net balance at the end of each year to be paid out in grants the following year in perpetuity.
- Pass-Through—funds flow immediately out as grants to nonprofits as your account is completely expended shortly after establishment.
- Sunset—enables you to structure your support so that your funds may be fully expended over a defined time horizon.

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**Alternatives to a Personal fund.**

- Fund for Omaha—our largest competitive grant program, designed to help nonprofits address community needs and to support effective solutions.
- Unrestricted Gift—allows your support to further the Foundation’s work aimed at increasing the local impact of our collective efforts through such programs as the Nonprofit Capacity Building Initiative, Omaha Gives!, and The Landscape.

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**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 benefiting 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.