



# We Connect!

charitable remainder    appreciated stock

**planned gifts**

CHARITABLE LEAD TRUST    trust

transfer of funds    bequests

403B    401K    life insurance

SECURITIES    CASH

real estate

## CONNECT WITH US

708-848-1560  
[oprfcf.org](http://oprfcf.org)



Hello,  
I'm pleased to share these ways the Oak Park-River Forest Community Foundation makes an ideal partner in helping your clients fulfill their philanthropic plans.

Sincerely,  
Kristin Carlson Vogen  
President & CEO

## As your clients look back on 2016 and their charitable giving, they might be aiming for two goals:

- giving tax smart
- giving with impact

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How are you helping your clients think through these two goals? Do you call on partners to assist your clients? Consider the Community Foundation as a partner in such efforts. For example, a client may have appreciated stock held for more than a year. The same client may be considering making gifts to charity. To avoid capital-gains taxes on the increase in value over time, which your client would have had to pay if they sold the stock, they can give the stock to us and deduct the full fair market value. The Oak Park-River Forest Community Foundation can receive such gifts as a 501c3 public charity and facilitate distribution to causes that matter to your client.

## Making the Complicated Simple and Flexible

Why start a private foundation when you can avoid legal and accounting fees through a donor advised fund with us? **Funds with assets over \$500,000 can remain managed by the client's existing managers.**

## Thinking About One's Legacy

Thinking about one's legacy need not start later in life. A client could plan their legacy today by establishing a fund named by and/or for the client at the Community Foundation which could be funded in a variety of ways:

- Cash
- A portion of the estate as a bequest to public charities
- Designating this fund as a percentage beneficiary of life insurance or retirement accounts

### Here is an example of how we can help your client create his or her legacy:

A couple with no heirs wanted to distribute their \$5M estate to philanthropies over 10 years upon their death. They partnered with us because the Community Foundation could open a fund in their name and seek out causes/charities that met the couple's philanthropic interests locally, regionally and nationally. The Foundation's professional staff and grants committee will always be available to guide gifts from this fund to insure that the donors' charitable interests are met.

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