

Trusts

One may make a gift of cash, securities, or other property for the benefit of designated Catholic causes through his/her revocable trust as part of their estate distribution plan. Other charitable trusts can be designed to allow the donor to receive an annual income from the trust assets or to allow a Catholic cause to receive income for a number of years with the principal then reverting to the donor or his/her heirs.

Annuity

One may enter into an agreement in which he/she makes a gift for the benefit of a designated cause or institution and from which he will receive a guaranteed annual income for the rest of his/her life and/or the life of a named survivor.

Life Insurance

One of the most popular ways to use life insurance for charitable giving is to name the Foundation as the owner and beneficiary of the policy.



Life Estate

A donor may deed his/her personal real estate to The Catholic Foundation of Oklahoma for Catholic causes while reserving the right to use the property for life or a number of years.

Outright Gift

One may make gifts of cash, securities or other properties, including real estate, directly to The Catholic Foundation of Oklahoma, either undesignated or for the immediate use of a particular cause.

How Can I Establish a Fund at the Foundation?

A Fund at The Catholic Foundation is a great alternative for families or individuals who would like to invest in the future of their Catholic faith through a current or legacy gift. A designated Catholic cause would receive regular support from the Fund bearing your name for years to come. The Foundation staff can assist you in directing your gift as you designate.



The Archdiocese of Oklahoma City

The Archdiocese of Oklahoma City is comprised of 46 counties in Central and Western Oklahoma. There are 108 parishes /missions serving a Catholic population of 110,000 people in approximately 42,000 family units. The Archdiocese provides numerous services that basically touch the lives of all Catholic people.

For more information or a visit from a Foundation representative, contact:



THE CATHOLIC FOUNDATION OF OKLAHOMA, INC.

P.O. Box 32180

Oklahoma City, Oklahoma 73123

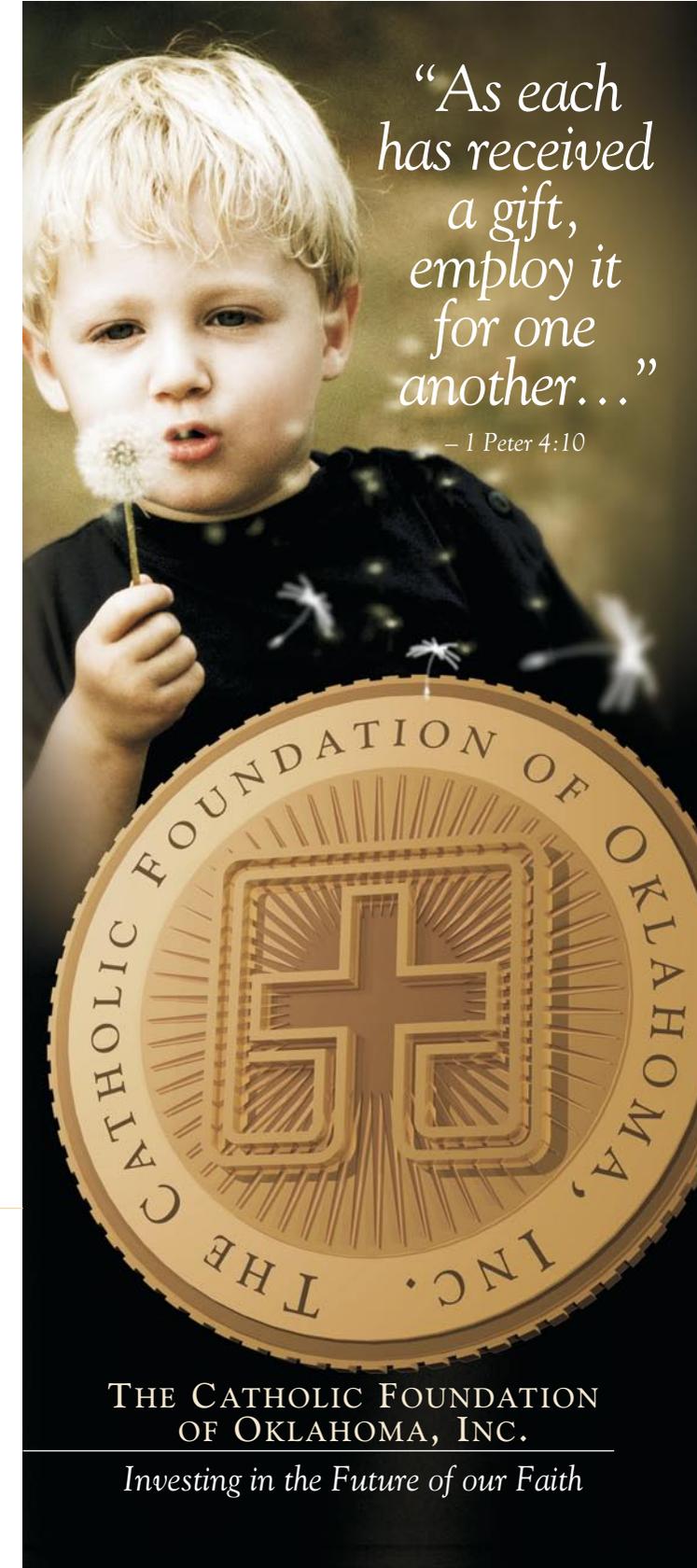
(405) 721-4115

www.cfook.org

Investing in the Future of our Faith

“As each has received a gift, employ it for one another...”

— 1 Peter 4:10



THE CATHOLIC FOUNDATION OF OKLAHOMA, INC.

Investing in the Future of our Faith

Philosophy & Purpose

The Catholic Foundation of Oklahoma, Inc., incorporated in 1965, is a nonprofit entity established to provide a means for individuals and organizations to ensure long-term financial stability for charitable, religious and educational institutions of the archdiocese. With the spiritual leadership and guidance of the Archbishop of Oklahoma City, the Foundation is managed by a Board of Directors, consisting of one priest and professional lay men and women. Their efforts are directed principally toward the wise and sound management of the Foundation's financial resources.



In carrying out its mission, the Foundation:

- Provides estate planning and charitable giving information and assistance;
- Provides gifting vehicles in which the Church or related entities are designated beneficiaries;
- Serves as a central clearing house for pooled investment management services for parishes, schools, and
- Related entities' custody funds;
- Distributes earnings on its endowed

funds to designated Archdiocesan entities and for activities which would further the development of the Catholic Church in central and western Oklahoma.

Who Operates the Foundation?

The Catholic Foundation of Oklahoma is directed by a Board of Directors consisting of 25-30 professional men and women. leadership advice is given Executive Director of the Foundation, in order to enable him to manage the day to day operations more efficiently.



What Does the Foundation Do?

The primary purpose of The Catholic Foundation of Oklahoma is to promote and to receive gifts for the endowment and capital needs, to invest them wisely, and to distribute the income and / or principal to Catholic Causes as specified by the donors.

The Catholic Foundation is involved in other ways including:

- Scholarships and Grants
- Planned Giving Assistance
- Professionally Managed Investment Pool
- Annuity Investment Opportunities
- Supporting Archdiocese Programs

What Can You Do?

The Catholic Foundation of Oklahoma is people... people like you who have a concern for God's work on earth... people who will express their Christian commitment through financial support.

The lesson of stewardship is one of faith, as God comes before all else. This faith



enables us to focus on serving others, rather than attaching ourselves to personal gains and treasures. Ultimately we need to return to God a portion of all of

that we have received in life back to Him.

Planned Giving allows the donor the opportunity to continue his/her stewardship through a variety of methods. Some of the most common are described in the following paragraphs.

Wills

A will is a legal document which provides for an orderly transfer and distribution of assets to the persons and causes of one's choice after death.

Mission Statement

Our mission is to procure and build endowment funds while serving as a permanent organization for management and the administration of funds given to the Archdiocese of Oklahoma City for the advancement and expansion of the Roman Catholic Church in Central and Western Oklahoma.

