

Six Easy Steps to Opening a Donor Advised Fund

There are 6 easy steps to opening a Donor Advised Fund (DAF) at the Catholic Foundation of Oklahoma which will allow you to begin making gifts to the causes closest to your heart:

- Contact our office to have applicable DAF forms and information sent to you via email, fax or regular mail.
- Review the FAQ and DAF Guidelines (which include fee information) to make sure they align with your giving needs.
- Fill out the DAF Application. (This is where you chose a name for your fund, identify who the advisors and successors of the fund will be and what your wishes for continuation are.)
- Using a DAF Deposit Form, make a deposit (minimum of \$5,000) into your Donor Advised Fund. You will automatically receive a letter from the Foundation for your contribution as a fully tax deductible donation.
- Complete an Investment Recommendation Form and send it to our office by email, fax or mail.
- When you are ready to make a grant from your fund, complete a DAF Grant Form and send it to our office via email, fax or mail. We will process your request within 14 days.

Your Gift
is the
answer to
someone
else's
prayer.



Catholic Foundation
of Oklahoma

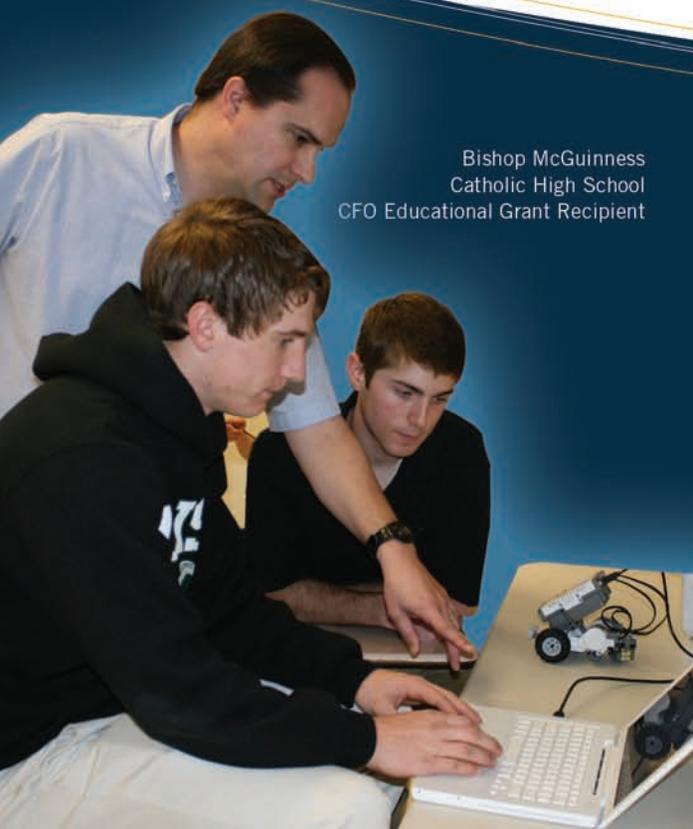
Donor Advised Funds

A Personalized Legacy of Giving
For Families and Individuals

Getting Started

A Donor Advised Fund with the Catholic Foundation of Oklahoma offers individuals and families a way to support the causes you believe in. If you want to explore the options available to you through a Donor Advised Fund, call us today at **405-721-4115** or send us an email to **cfo-info@archokc.org**.

We will, without obligation, personalize an example for your situation and provide you with other planning ideas that meet your objectives.



Bishop McGuinness
Catholic High School
CFO Educational Grant Recipient



Contact Information: Catholic Foundation of Oklahoma

7501 N.W. Expressway • P.O. Box 32180
Oklahoma City, OK 73123

Telephone: 405-721-4115
FAX: 405-721-4114
cfo-info@archokc.org

For more Information visit:
www.cfook.org

Investing In The Furture Of Our Faith



Trojan Family
Donor Advised Fund Holders

How a Donor Advised Fund Works

Many Catholics want to make a positive difference in the lives of others. If you want your charitable donations to support organizations of particular interest to you, but you would prefer to avoid the administrative and fiduciary burdens of forming or maintaining a private family foundation, then a Donor Advised Fund (DAF) with the Catholic Foundation of Oklahoma (CFO) can work for you.

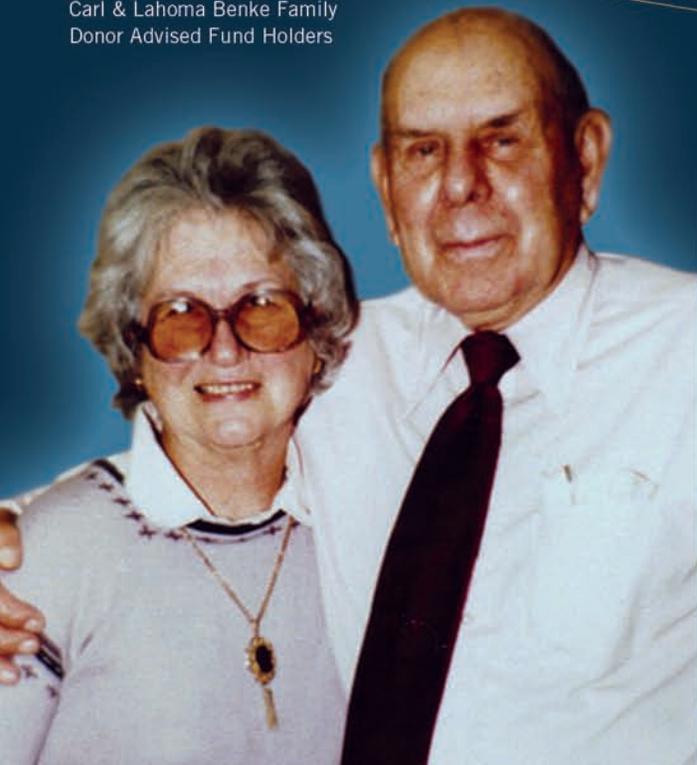
To establish a Donor Advised Fund simply complete an agreement form and contribute an irrevocable gift of \$5,000 or more in cash, securities or other assets. You may select any name for your fund, which can honor family friends or deceased loved ones.

You stay involved by advising the foundation on: which charities will receive grants from the fund; in what amounts; and when the grants will be disbursed. You also recommend who will be the successor advisor(s), thus offering family involvement over generations.

The Catholic Foundation monitors the investments and only pays out grants based on your recommendations.

Donors can also define certain areas of interest rather than individual charities and

Carl & Lahoma Benke Family
Donor Advised Fund Holders



allow the Foundation the discretion to select grant recipients within these areas of interest. For example, donors can specify that their fund support agencies and institutions that help children, the homeless, the disabled, education or the elderly.

Providing a Perpetual Legacy

Donor Advised Funds are one of the most exciting new vehicles for supporting the ministries of the Catholic Church and other charities you care about, and for providing a perpetual legacy. Once you have made an initial contribution, the Catholic Foundation assumes its role as a steward of the funds, investing them prudently for both growth and income.

Benefits of a Donor Advised Fund with CFO

- Contribute when needed, and receive an immediate income tax deduction;
- Enjoy a quick and easy set-up with a \$5,000 minimum initial gift;
- Utilize the fund as a Catholic checking account to make grants to any qualified charity in the Archdiocese of Oklahoma City and around the United States;
- Select anonymity on a grant-by-grant basis, or for all your disbursements;
- Benefit from professional investment management; and
- Involve your children and other relatives through multi-generational capacities that make Donor Advised Funds an efficient and meaningful vehicle for your family's philanthropy.



Patricia Hess, St. Francis Xavier Church, Enid,
Scholarship Recipient
from Davis-Lawrence Scholarship Fund



A Donor Advised Fund is your answer to:

- Simplifying your charitable giving.
- Staying involved in your giving and involving your family members or friends in giving together.
- Honoring or memorializing a loved one, or commemorating a special occasion.
- Ensuring the continuation of a program or service of particular importance to you.
- Reducing income taxes and avoiding capital gains tax on sale of appreciated assets.
- Building a Significant gift over time.

Donor Advised Funds are one of the most exciting new vehicles for supporting the ministries and charities you care about, and for providing a perpetual legacy