



ACHIEVING YOUR GOALS AND SECURING OUR FUTURE













Few events in our recent past have rocked America with greater intensity than the April 19, 1995, bombing of the Alfred P. Murrah Federal Building in Oklahoma City. But the story of the bombing does not stop with the attack itself or with the many losses that resulted from that fateful day. The Oklahoma City National Memorial & Museum tells the story of not only the tragedy of the bombing but stories of resolve and resilience, of heroes and healing.

It is vital that the Memorial and Museum remain at the world-class standard in which it was built. It is our responsibility and privilege to fulfill our promise *to remember those who were killed, those who survived and those changed forever*. Together we can continue to educate and inspire this generation and future generations. That is why we seek your continued support.

With concerns about the current economic environment, the impact of inflation, the stock market, or your personal budget, now is the time to consider alternative giving opportunities. Through intentional planning and by including a legacy gift in your will or estate plan, you can help secure your legacy and your values, and ensure the Oklahoma City National Memorial & Museum continues its mission. As a legacy donor, you will be recognized as a member of our 9:03 Society.

There are many simple, yet effective ways to support our mission, while also achieving your estate planning goals. Among those are:

-  **Wills and Trusts**
-  **Beneficiary Designations**
-  **Retirement Assets**
-  **Real Estate**
-  **Memorials and Tribute Gifts**
-  **Endowed Gifts**
-  **Donor Advised Funds**
-  **Appreciated Stocks/Bonds**
-  **Life Insurance**
-  **IRA Charitable Rollover**

WILLS AND TRUSTS

One of the simplest and most flexible ways you can support our mission is through a future gift made through your will or trust. You have the option to give a specific dollar amount, a specified asset, a percentage of your estate, or the rest and residue of your estate. If you would like to include the Oklahoma City National Memorial Foundation in your will or trust, here is some recommended language:

“I give, devise, and bequeath to the Oklahoma City National Memorial Foundation, located at 620 N Harvey Ave, Oklahoma City, OK 73102, the sum of \$_____ or _____% of the rest, residue and remainder of my estate, for its general use and purpose”; or

“I give, devise, and bequeath to the Oklahoma City National Memorial Foundation, located at 620 N Harvey Ave, Oklahoma City, OK 73102, all of the right, title, and interest in and to the real estate located at (provide address and legal description of property), for its general use and purpose”; or

“I give, devise, and bequeath to the Oklahoma City National Memorial Foundation, located at 620 N Harvey Ave, Oklahoma City, OK 73102, (describe specific asset), for its general use and purpose.”

BENEFICIARY DESIGNATIONS

Designating the Oklahoma City National Memorial Foundation as the beneficiary of your retirement plans, IRAs, life insurance, commercial annuities, bank accounts, certificates of deposits, brokerage or other financial accounts is another effective way to help continue our mission. With a beneficiary designation, you can continue to benefit from these accounts during your lifetime. Among the options available to make this type of gift are the Payable on Death option and the Transfer on Death option.

Payable on Death (POD) – With the POD option, you can designate all or a percentage of your bank account or Certificate of Deposit to the Oklahoma City National Memorial Foundation as the beneficiary of funds remaining after your death. The Foundation, as the beneficiary, has no rights to the funds until after your lifetime. With the POD, estate planning and administration are made easy. Simply ask your bank representative for their form to place a POD designation on your account.

Transfer on Death (TOD) – With the TOD option, you can designate all or a percentage of your brokerage or investment account to the Oklahoma City National Memorial Foundation. The TOD designation, like the POD designation, makes estate planning simple and easy. To make the TOD designation, ask your investment advisor for their form to place a TOD designation on your account.

RETIREMENT ASSETS

Donating a portion or all of your unused retirement assets, such as your IRA, 401(k), 403(b), pension, or other tax-deferred plans, is an excellent way to make a gift to the Oklahoma City National Memorial Foundation.

Did you know that 40%-60% of your retirement assets may be taxed if you leave them to your heirs at your death?

You can make a gift of your unused retirement assets to help further our mission by completing a beneficiary designation form provided by your retirement plan custodian.

When you designate the Oklahoma City National Memorial Foundation as a beneficiary, we will benefit from the full value of your gift because your retirement assets will not be taxed at your death. And your estate will benefit from an estate tax charitable deduction for the gift. Beneficiary designations are revocable and can be modified at any time.

REAL ESTATE

When you donate all or a portion of highly appreciated real estate, such as a home, vacation property, undeveloped land, farm, ranch, or commercial property to the Oklahoma City National Memorial Foundation, you may potentially eliminate capital gains tax on the appreciation and be entitled to a fair market value tax deduction for the donation. A qualified appraisal is required to substantiate the fair market value.

MEMORIALS AND TRIBUTES

If you have a loved one who has been impacted by the Oklahoma City National Memorial & Museum and its work, establishing a memorial or tribute gift is a wonderfully meaningful way to honor that loved one while supporting our mission. Your memorial or tribute gift will be a lasting recognition of your loved one and will have a meaningful impact on the lives we touch. You can create a memorial or tribute gift using cash, appreciated securities, or real estate.

ENDOWED GIFTS

Throughout our lifetime, most of us strive to make a difference in the lives of others, providing gifts to the people and causes we value. Wouldn't it be nice to know that you could create a legacy of support for the causes that are most important to you? By creating or adding to our existing endowment, you can give a gift that lasts forever and continue to change lives even after you're gone.

You can give cash, securities, or other assets to our foundation's existing endowment or to our endowment maintained by the Oklahoma City Community Foundation or create one of your own. These endowed gifts can be made today or in your will or trust. You have the option to decide if your endowment will be designated to fund one of our programs or given without restrictions to fund our most critical needs.

DONOR-ADVISED FUNDS

Donor-Advised Funds (DAFs) are enormously popular charitable giving vehicles—known for their ease and flexibility. Through a Donor Advised Fund, individuals can make a charitable contribution, receive an immediate tax deduction, and then recommend grants from the fund over time. DAFs allow donors an easy way to streamline their giving and maximize their impact.

A grant from your DAF can help support our ongoing efforts to share our story and teach the senselessness of violence. Contact your DAF administrator and recommend that a grant be made in any amount to support the Oklahoma City National Memorial Foundation. When granting through your donor-advised fund, please use the following information:

Oklahoma City National Memorial Foundation
Tax ID # 73-1472725
620 N Harvey Ave
PO Box 323
Oklahoma City, OK 73101

APPRECIATED STOCKS/BONDS

Donating appreciated securities (stocks or bonds) is an easy and tax-effective way for you to make a gift to the Oklahoma City National Memorial Foundation. There are special rules for valuing a gift of stock. The value of a charitable gift of stock is determined by taking the mean between the high and low stock price on the date of the gift. Mutual fund shares are valued using the closing price for the fund on the date of the gift.

Please contact us for instructions on how you can transfer stock or bonds from your brokerage or investment account to the Oklahoma City National Memorial Foundation.

LIFE INSURANCE

A gift of your life insurance policy is an excellent way to make a lasting legacy. If you have a life insurance policy that has outlasted its original purpose, consider making a gift of your insurance policy to the Oklahoma City National Memorial Foundation. When giving a life insurance policy, you will receive a charitable income tax deduction. And if the Oklahoma City National Memorial Foundation retains the policy to maturity or if you name us as a beneficiary, once the policy matures, the proceeds of your policy will be paid to our organization so that we can use the proceeds to sustain our mission for future generations.

To make a gift of life insurance, please contact your life insurance provider to request a beneficiary designation form from the insurer, naming the Oklahoma City National Memorial Foundation as the beneficiary of your policy.

IRA CHARITABLE ROLLOVER

If you are 70 ½ or older, you can make an annual contribution of up to \$100,000 from your IRA to the Oklahoma City National Memorial Foundation. A donation made directly from your IRA to the Foundation reduces your taxable income and may satisfy your required minimum distribution for the year. Please note that IRA charitable rollover gifts do not qualify for a charitable deduction.

As the Oklahoma City National Memorial Foundation confronts the challenges of the future, we know that it is only through the generosity of friends like you that we can maintain and preserve this sacred ground. We would love to work with you to help create a lasting legacy that honors your values and helps you achieve your charitable giving goals. To learn more about these and other ways to help continue the mission of the Oklahoma City National Memorial & Museum for this and future generations, please contact:

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