



PLANNED GIVING GUIDE

Leaving a legacy to build brighter futures



DID YOU KNOW?

Planned giving can be simple & you could save on taxes now

- Leave gifts of cash, stock, bonds, real estate, insurance or unique assets to Positive Tomorrows in your will or trust - see sample language; or through your Donor Advised Fund (DAF)
- Make Positive Tomorrows a beneficiary on your life insurance policy, retirement, checking, savings or other account
- Maximize savings on estate taxes by leaving a charitable gift through your retirement account

Gifts can help you save or earn money now

- Avoid Capital Gains tax by donating appreciated assets
- Receive guaranteed lifetime income with a Charitable Gift Annuity benefitting Positive Tomorrows
- Avoid income taxes on your IRA's Required Minimum Distribution, if you're 70 ½ or older, with a Qualified Charitable Distribution of up to \$108,000
- Opportunity Scholarship Fund gifts offer state tax credits

Share your plan with Positive Tomorrows so we can thank you and be sure we understand your wishes. A planned gift of any size will make a difference!

Sample Language for your will or trust:

"I, Jane Sue Doe, give for unrestricted charitable use and purposes ____ (insert dollar amount, percentage of estate, or asset being gifted) to Positive Tomorrows, a nonprofit with Federal Tax ID 73-1393438 at mailing address: PO Box 61190, Oklahoma City, OK 73146."

Endowed Gifts Last & Grow

Do you make monthly or annual donations? An endowment gift of 20 times your annual gift will ensure your generosity lives on and will grow your impact, forever.

Endowment Gift | Annual 5% Impact

\$5,000	\$250
\$20,000	\$1,000
\$50,000	\$2,500
\$100,000	\$5,000
\$500,000	\$25,000
\$1,000,000	\$50,000

SHARE YOUR PLAN OR SCHEDULE TIME TO MEET

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