

ADULTS DISCOVER
SOMETHING WONDERFUL
BY PARTICIPATING IN OASIS:
**GETTING OLDER CAN BE ALL
ABOUT GROWTH.**



Life's journey brings with it **opportunities to
redefine who we are**, making aging joyful and
impactful for ourselves and our communities.

JOIN THE LEGACY CIRCLE

Contact us to see Oasis programs in action and learn
how a legacy gift could be the most important gift
you ever make to the future of healthy aging. Our
development staff is ready to assist you.

"One of the joys of giving is being able to give back
to an organization that is doing important work. Oasis
provides an avenue for older adults to keep learning in
a friendly environment. It is an important part of who I
am." –Tom Henry, Oasis Donor & Volunteer



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*Before making a legacy gift of any kind to Oasis or
other organization, consult your tax advisor.*



LEGACY CIRCLE

**WHEN YOU PLAN TO GIVE,
WE CAN PLAN TO GROW**

OASIS LEGACY CIRCLE: IMPACT THE FUTURE OF HEALTHY AGING

This information is for general purposes only. For more detailed information, consult your tax advisor.

TYPE OF GIFT	MINIMUM GIFT	GENERALLY ACCEPTED ASSETS	BENEFITS	TAX & OTHER CONSIDERATIONS
Bequest	Costs Nothing Now	Transfer of Cash, Securities or Other Assets	<ul style="list-style-type: none"> + You retain control of your assets during your lifetime. + You may modify your bequest if circumstances change. + You designate how the gift will benefit Oasis. 	<ul style="list-style-type: none"> + Gifts from your estate are exempt from federal estate taxes
Named Fund	\$10,000	Cash or Securities	<ul style="list-style-type: none"> + You designate how this gift will benefit Oasis. + A fund can be named in tribute to a loved one. 	<ul style="list-style-type: none"> + You receive an income tax deduction in the year you establish the fund, which can be carried forward up to five years if needed. + Friends and family can contribute to these funds for an even larger impact.
Retirement Assets	Your Choice	401(k)s, 403(b)s, Pensions and Other Qualified Plans	<ul style="list-style-type: none"> + You may alter your gift amount at any time. + You can continue to make withdrawals during your lifetime. 	<ul style="list-style-type: none"> + These assets transfer to spouses without taxation, but are heavily taxed when given to children and grandchildren.
IRA	Your Choice	IRA	<ul style="list-style-type: none"> + If you are 70 1/2 or older, you do not have to take a minimum distribution. 	<ul style="list-style-type: none"> + You can donate up to \$100,000 with no tax liability.
Life Insurance	Your Choice	Life Insurance Policies	<ul style="list-style-type: none"> + Your gift is confidential and flexible. + Proceeds are paid in cash and not usually tied up in probate. 	<ul style="list-style-type: none"> + Your gift is tax deductible in most cases.
Gifts of Appreciated Securities	Your Choice	Stock Market Shares, Bonds or Mutual Fund Shares	<ul style="list-style-type: none"> + This option safeguards liquid assets so they can be used for immediate needs. + You may be able to give Oasis a larger gift. 	<ul style="list-style-type: none"> + You are able to avoid capital gains taxes. In order to take the full appreciated value as a tax deduction, you must hold the security for more than year.
Charitable Gift Annuity	\$10,000	Cash or Securities	<ul style="list-style-type: none"> + This option creates income for you during your lifetime. 	<ul style="list-style-type: none"> + This type of gift may create an immediate tax deduction.
Charitable Remainder Trust	Best Used for Larger Gifts	Cash or Securities	<ul style="list-style-type: none"> + This option pays a fixed percentage of the trust's assets to you as valued annually for a term you specify; the remainder is distributed to Oasis. 	<ul style="list-style-type: none"> + This type of gift creates an immediate tax deduction and guarantees payments for life.
Charitable Lead Trust	Best Used for Larger Gifts	Cash or Securities	<ul style="list-style-type: none"> + This option pays a fixed or variable income to Oasis for a time, then trust principal balance is transferred back to you or your loved ones. 	<ul style="list-style-type: none"> + This gift reduces your taxable estate. + The gift is given back to your family, often with a reduced gift tax.