

Oasis Legacy Circle

Your plans today can help sustain
Oasis for the future.



At Oasis, we believe that **getting older is a time of growth**—continued learning, improved health, meaningful connections, and being part of a vibrant community. A planned gift is a powerful way to ensure that this work continues for generations to come.



"I was inspired to include Oasis as a beneficiary of my IRA because of just how much nearly 19 years of tutoring has enriched my life. I'm grateful for the opportunity to leave a lasting impression on a program that inspires me, and I know my gift will play a part in helping others become tutors."

Karen Priest, Oasis tutor, donor, and Legacy Circle member

Join the Oasis Legacy Circle

When you include Oasis in your plans, you become part of the Oasis Legacy Circle, a community of supporters committed to the future of healthy aging.

Oasis Legacy Circle members are recognized for their vision and generosity and help ensure that Oasis continues to be a place where older adults can learn, connect, and thrive.

"Oasis meets the needs of both young and old in our community. As I get older, I want to do whatever I can to make sure Oasis continues—supporting kids through tutoring and mentoring, and older adults through learning and health programs. I can't think of anything more meaningful."

Dick Miles, Oasis board chair, participant, donor, and Legacy Circle member



A legacy gift is not just about what you leave behind... it's about **what you make possible.**

Leaving a Legacy Through a Planned Gift: Simpler Than You Think

A planned gift can support Oasis now, in the future, or over time, creating a lasting impact on our mission. Many options require no immediate financial commitment, and most can be updated as your circumstances change.

Bequest in a Will or Trust

Designate a specific dollar amount, a percentage of your estate, or what remains after other commitments are met, while retaining full control of your assets during your lifetime.

Retirement Account Beneficiary (IRA, 401(k), 403(b))

Name Oasis as a beneficiary by filling out a simple form with your plan provider. These gifts can be especially tax-efficient, as retirement assets may otherwise be heavily taxed when passed to heirs.

Life Insurance Beneficiary

Designate Oasis as a full or partial beneficiary of an existing or new policy.

Gifts of Stock or Appreciated Assets

Donate appreciated securities to potentially avoid capital gains taxes while making a larger impact than a cash gift of the same value.

Other Options to Consider

Explore options such as charitable gift annuities or trusts, which can provide income during your lifetime while supporting Oasis in the future. Our team can help you learn more.

By including Oasis in your plans, you help:



Expand lifelong learning opportunities like classes, wellness programs, trips, and more.



Strengthen programs that reduce isolation and promote health and independence.



Improve academic outcomes for elementary students through intergenerational tutoring.



Ensure future generations of older adults can thrive.

Many donors choose to make a legacy gift to give back to an organization that has been meaningful in their lives—often in a way that is simple, flexible, and aligned with their financial goals and philanthropic values.

Potential Benefits to You

- **Flexibility:** adjust your plans at any time
- **Tax advantages** for you or your estate
- The ability to make a larger, **lasting impact**

Most importantly, planned gifts enable you to share your values with future generations, creating a legacy that reflects what has mattered most throughout your life.

Let's Start the Conversation

Planning a legacy gift can be straightforward—and we are here to help. If you're considering a planned gift, our team can:

- Share sample bequest language
- Walk through giving options in simple terms
- Work with you and your advisors to ensure your wishes are honored
- Help you think about how your gift can reflect your values and interests

If you have already included Oasis in your plans, we hope you will let us know so we can thank you and recognize you as part of the Legacy Circle.



Please visit
stloasis.org/plannedgiving
to learn more or contact
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*This information is for general purposes only.
Please consult your financial or tax advisor when
considering a planned gift.*