

## Executive Director Eric Gray Receives Chartered Advisor in Philanthropy® Designation



Eric Gray (fourth from left) along with fellow classmates is recognized by the Oklahoma City Community Foundation for completing the Chartered Advisor in Philanthropy® program.

Eric Gray, Executive Director of the Oklahoma Disciples Foundation, recently received his designation as a Chartered Advisor in Philanthropy® (CAP®). This designation provides tax, accounting, legal, financial and charitable advisors with the knowledge and tools needed to help clients articulate and advance their highest aspirations for self, family and society.

CAP® holders become members of a growing network of top planners who are working to make our towns and cities better places to live for generations to come. Courses provide an insight into the process of philanthropic planning, including, but not limited to, tax, tools and techniques.

Eric was one of ten members of the inaugural class for CAP® in Oklahoma sponsored by the Oklahoma City Community Foundation. Over ten months from September 2018 to June 2019 the class completed three graduate level courses through the American College of Financial Services – “Planning for Impact in the Context of Family Wealth”, “Charitable Giving Strategies” and “Gift Planning in a Nonprofit Context.” Successful completion of the courses required passing final exams.

Obtaining the CAP® designation also requires meeting certain ethical standards and adhering to the Donors Bill of Rights as well as applicable professional codes of conduct. In order to maintain the CAP® designation, Eric will be required to complete ongoing continuing education requirements.

CAP® advisors understand that philanthropy is changing in many unique ways. To have philanthropic impact the needs of the charity must match the desires of the donors. More and more philanthropy is donor-focused and individualized to accomplish donor goals and aspirations.

Donors getting advice from a CAP® designee can be confident they are getting ethical and appropriate information suitable to their situation. Charities must find ways to meet the needs of the donors without straying from the charitable mission. CAP® designees can be navigators in this process.

Eric is available to meet with disciple church groups or individual members to discuss and provide information on charitable giving, planned giving and ways the Foundation can assist with these matters.

## Say "YES" to the IRA Charitable Rollover!

If you are 70 ½ or older you can make direct transfers of money from your IRA account to the Foundation satisfying your annual required minimum distributions (RMDs) without including any of the distributed money in your gross income. It is called a qualified charitable distribution (QCD) or Charitable Rollover. The law allows QCDs up to \$100,000 per person per year. These types of gifts are great ways to start an endowment for your church, the Region or any program or mission you are passionate about.

You can even set up an endowment with distributions to go through the Foundation's grant program for whatever area of interest you want to benefit. You can also do this through our new Field of Interest fund procedure if you want to have more flexibility in deciding what area should get funding.

A gift of \$10,000 will establish either a Field of Interest Fund or an endowment. You select the name and the beneficiary.

Gifts under \$10,000 can be made to any existing endowment fund or to Disciple Club to support our ongoing programs.

This year say "YES" to the IRA Charitable Rollover and let your legacy begin! Call us or visit our website to learn about the benefits of making an IRA charitable rollover gift this year.

## Grant Funds Making a Difference in Jamaica



This summer, First Christian Church, Stillwater, partnered with other Oklahoma Disciples' churches (First Christian Church, El Reno; First Christian Church, Guthrie; and Central Christian, Enid) to serve with ACE ministries in St. Mary's parish, Jamaica. Forty-one participants from age 7 to 70 did a variety of tasks including hosting a three-day vacation bible school with bible stories, crafts and games; juice, soup and fruit distribution and connecting with infirmity residents; organizing items for the annual thrift sale; providing back-to-school supplies for children and pouring a concrete foundation for the Peace House (above photo).



*It's Not Too Late to Register for*

## FAITH UNDER FIRE: Teaching & Preaching Generosity

The Oklahoma Disciples Foundation is pleased to welcome Rev. Dr. Dale McConnell with Horizons Stewardship as a guest speaker for a one day stewardship and generosity seminar in Tulsa.

Topics include:

- Worst Practices in Stewardship
- Next Level Generosity
- Effective Preaching for Inspiring Generosity

Eric Gray, Oklahoma Disciples Foundation Executive Director, will also speak about Planned/Estate Giving and how the Foundation can assist churches and disciples with planned gifts.



Rev. Dr. Dale McConnell



### Who Should Attend?

Disciples clergy, church moderators, laity or others wishing to learn more about stewardship within the Church and estate planning. Pastors are eligible for continuing education credits.

OKLAHOMA DISCIPLES FOUNDATION  
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The Foundation newsletter is published quarterly. Email Julie Bowers (jabowers@okdfdn.org) to opt out or advise of any errors, changes, or to update your email and contact information. Every effort was made to ensure the accuracy and completeness of this publication.

ODF STAFF  
Eric S. Gray, Executive Director  
Rev. Kyle V. Maxwell, Minister of Faith & Giving  
Dr. Vicki Rose, Director of Operations  
Julie Bowers, Development Associate  
Holly Day, Administrative Assistant

FAITH UNDER FIRE: Teaching & Preaching Generosity



Tuesday, September 24, 2019  
10:00 a.m. — 3:00 p.m.  
Yale Avenue Christian Church  
3616 S. Yale Ave.  
Tulsa, OK 74135

No Cost • Must Register • Complimentary Lunch •  
Pastors Continuing Education Credits • Fellowship

Register online: [www.okdfdn.org/events](http://www.okdfdn.org/events)  
or scan to register

Have questions or need more  
information?

Call: 405.525.6530 or email  
jabowers@okdfdn.org



## Happy Anniversary!

*Celebrating 100 Years*

East Side Christian Church, OKC

*Celebrating 125 Years*

First Christian Church, Pawnee

First Christian Church, Claremore

West Point Christian Church, Yukon

First Christian Church, Alva



**Oklahoma Disciples**  
FOUNDATION, INC.  
301 NW 36th Street  
Oklahoma City, OK 73118  
Phone: 405.525.6530  
[www.okdfdn.org](http://www.okdfdn.org)

Mail this form and check to the Foundation at the address listed above. Or, gifts may be made via PayPal or credit card online at our website listed above.

**THANK YOU!**

☐ I am interested in establishing a permanent endowment to benefit a heartfelt cause or church mission.

☐ I am interested in receiving information on making a bequest to the Foundation.

**I/We Wish to Make a Tax-deductible Gift to:  
Oklahoma Disciples Foundation, Inc.**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

☐ Yes! Please sign me up for email news updates.

My gift is given in (honor/memory) of:  
circle one

Name: \_\_\_\_\_

YES! I would like to make a gift to ODF in the amount of:

\$25 \_\_\_\_\_ \$50 \_\_\_\_\_ \$100 \_\_\_\_\_ Other \_\_\_\_\_

Please invest my gift in:

☐ Disciple Club supporting ODF Operations.

☐ Named Endowment Fund as listed below:

\_\_\_\_\_  
(Please list fund name)

☐ Yes, I have included ODF in my estate planning. Please call me to discuss my wishes.

\*Gifts to Oklahoma Disciples Foundation are tax-deductible as allowed by law. Gifts may be made to a specific Endowment Fund or to Disciple Club. A list of funds is available on the Foundation website at [www.okdfdn.org](http://www.okdfdn.org). We are grateful for your gifts, support and prayers.