

Our mission is to sustain an enduring financial basis for Christ's ministry through the prudent investment of funds to ensure a legacy of Christian principles and institutions.

WAYS TO GIVE

ENDOWMENTS

Contributing to one of our existing endowments is as easy as writing a check or donating online. For a listing and description of existing endowments or to donate online, please visit our website at www.okdfd.org. Establishing a new endowment is just as easy and provides a lasting legacy of the donor's love, faith and obedience.

PLANNED GIFTS

Buying a Gift Annuity can provide income for life and a large gift to the Disciples entity of your choice following death. For larger estates, a Charitable Trust

may be more appropriate. For those who have charitable intent but who need only the income or estate tax benefits we can suggest a variety of options from beneficiary designations and bequests to charitable lead trusts. Many of these options are detailed on our planned giving website at www.odflegacy.org We suggest that donors get independent advice from their own CPA and/or attorney regarding these matters. We can, however, work closely with a donor's advisors to



accomplish the intent of any gift.

BLENDED GIFTS

We can also help with information on blended gifts which enable you to give now and in the future.

SUPPORT

The work of the Foundation and the benefits of that work depend on members of the Christian Church knowing what is available to them and to their churches. By simply being educated about what the Foundation has to offer and, when appropriate, sharing that knowledge provides vital support.



Phelps, Dean. "Oklahoma Tables."

TOGETHER WE TOUCH LIVES

The Oklahoma Disciples Foundation



Founders Sam & Mary Howard

Who We Are

Did you know the Oklahoma Disciples Foundation has been in existence for more than 50 years?

The Oklahoma Disciples Foundation (ODF) is the product of a 2001 merger of the Oklahoma Christian Foundation (OCF) and the Northeast Oklahoma Christian Foundation (NEOCF). These two entities had been serving as the repositories of endowments for activities of the Christian Church in Oklahoma since the 1960s. ODF has continued that work and currently manages over \$19 million in assets in more than 100 endowment and custodial funds. The Foundation is an independent non-profit Oklahoma corporation governed by a volunteer Board of Directors representing Christian Church members from all areas of

the State of Oklahoma. Daily activities of the Foundation are the responsibility of the small Foundation staff: Eric Gray, Executive Director; Dr. Vicki Rose, Director of Operations; Rev. Dr. Kyle Maxwell, part-time Minister of Faith and Giving and immediate past Executive Director; Julie Bowers, Development Associate; and Hannah Bingham, part-time Administrative Assistant.

ODF utilizes the professional money management services of Bank of Oklahoma and invests pursuant to the Foundation's Investment Policy. Annual distributions are made to beneficiaries of our funds in accordance with our donors' directions and intention as well as our policies, including a formal Spending Policy. These documents are available on our website www.okdfd.org or on request.



Carl & Armelda Linton



TOGETHER WE TOUCH LIVES

What We Do

We believe good stewardship is the basis for living a Christian life. Stewardship of time, talents and money are vital in our relationships with God and with each other. *Our mission is to sustain an enduring financial basis for Christ's ministry through the prudent investment of funds to ensure a legacy of Christian principles and institutions.* We aim to be good stewards of the funds entrusted to us.

ENDOWMENTS

Our existing endowments provide funding for a broad array of programs and ministries. A majority of our endowments have a specific beneficiary such as an individual church, camp or

educational institution. Some of our endowments generate yearly funds for our grant making program. Application for these grants is open to Christian church institutions and related entities.

CUSTODIAL FUNDS

Our Custodial Funds program enables Churches and other Disciple institutions to obtain endowment investment returns while maintaining liquidity. We offer three different investment pools with varying degrees of risk versus expected returns. We have also worked diligently to reduce the costs of investment to enable greater returns for the churches and institutions.

PLANNED GIVING

Our planned giving programs offer individuals a wide range of charitable options while

providing individual benefits. Charitable trusts, gift annuities and donor advised funds are available to individuals for the benefit of the church. Trusts and annuities can be utilized to provide an income stream to the donor with a remainder interest to the church or Foundation. The donor advised fund program enables current year tax deduction for multiyear future donations.

EDUCATION

We also work to enable churches and their leadership to establish strong stewardship principles among their congregations. Through the year we bring the message of good stewardship and generous living to Disciples congregations across the State of Oklahoma by sponsoring seminars and providing other educational opportunities.

Why Us?

We are Oklahomans and members of local Oklahoma congregations. We are easily accessible to our donors, beneficiaries and the local churches. We concentrate on the programs and ministries affecting or relating to the Christian Church in Oklahoma but we strive for the advancement of God's work everywhere. In the past five years we have distributed over \$1.8 million to the beneficiaries of our endowments (an average of \$360,000 per year) while growing the overall pool of assets. We endeavor to maintain quality in our mission as well as prudence, consistency and faithful obedience to God.

Where You Come In

The Foundation and the church are dependent upon the faithfulness of the people to respond generously to the needs of the community within and outside the church. Generous people are charitable and joyful people. What will be your legacy? Will your generosity enable the work of the church well into the future? Will you lead so others may follow?

Together We Can Touch Lives

Your willingness to give generously allows us to continually increase the support



for the beneficiaries of the existing funds and/or create new funds for perpetual funding of God's work. If you are unable to financially support the church or the Foundation at this time, you can still help. We would like for everyone who is willing to be in prayer with us. Also please visit our home webpage at www.okdfd.org and provide us your email address so we can keep you up to date on the activities of the Foundation.

When Is The Time To Act?

If you haven't already included the church in your plans for the future, the time to act is *now*. We would be delighted to meet with you to discuss the specifics and provide any additional information you may need. We provide this as a service to Christian Church, Disciples of Christ, churches and members in Oklahoma.



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Planned Giving

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The information contained in this publication provides illustrative and educational information and should not be considered tax or legal advice. Please consult with your tax or legal advisor about your estate plan.