



## THE POWER OF TOGETHER

Together. Together makes a community possible. Together allows us to share our talents and become more than we ever could alone. Together gives those struggling and hurting the opportunity to recover and give back to those that reached out to them. Together creates art and beauty and meaning for all us to enjoy. Together knows no limits to what we can accomplish.

At the Bartlesville Community Foundation, we believe in the power of together. We offer a place for donors to invest in the charitable organizations and causes they want to succeed today and tomorrow. And by joining donors together, we can grow faster and invest more in the community with less expense. That means a better, stronger, brighter Bartlesville for everyone.

Let us show you how the Bartlesville Community Foundation uses the power of together to make your charitable goals a reality.



## ARE YOU READY TO WORK TOGETHER FOR BARTLESVILLE?

The Bartlesville Community Foundation will be happy to work with you and your financial adviser to learn more about the Foundation.

### Contact Information

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# WHAT IS THE BARTLESVILLE COMMUNITY FOUNDATION?



# HOW CAN I GIVE TO THE FOUNDATION?

The Bartlesville Community Foundation is a collection of endowed funds that benefit the charitable organizations, programs, and special projects of Bartlesville. The purpose of the Foundation is to provide a steady source of income to these entities, as well as special grants, following the wishes of the donors that contribute to and create the funds.

By bringing funds together, the Foundation is able to provide administrative, investment, and grant making support for everyone: Eliminating the need for individual donors to set up separate institutions, formulate policies, file innumerable forms, and monitor the status of grant recipients. This means more of each dollar can return to the charities donors support and less goes to operating costs and overhead.

Because funds are endowed, donors create gifts that can last long beyond their lifetimes, ensuring they can continue to support the institutions and programs they cherish.

As a public charity, The Bartlesville Community Foundation allows for the greatest tax deductions permitted by law and your tax status.

You can make a gift to any current fund in the Foundation. Any size donation, even a dollar, is welcomed and will help the endowment to grow. We believe in being a true Community Foundation, where everyone can contribute no matter their means.

The Bartlesville Community Foundation can also assist you in creating a fund of your own. We provide great flexibility in helping you create endowed funds when you want for the purposes you want.

**When You Want:** You and your family can start a fund now, leave instructions for a fund in your will, or create a fund through a trust arrangement that benefits your family and the charities you wish to support. You can also use a variety of assets to start your fund: cash, securities, stocks, real estate, life insurance, tangible personal property, or private foundation assets. Tax benefits occur at the time of your gift and according to the asset donated.

**For the Purposes You Want:** The Bartlesville Community Foundation exists to help you accomplish your philanthropic goals. We have a variety of funds available to meet your charitable interests. Please note that minimums only refer to creating a named fund. You have up to five years to reach the minimum level required.

**Designated Funds:** Donors may designate one or more specific charitable organizations to receive annual grants from their endowed fund. Donors may select the fund name. \$10,000 minimum.

**Donor-Advised Funds:** The donor may suggest grants from the fund each year. Although the IRS requires that the Foundation have variance power over the fund, the Foundation will accept the donor's recommendations as long as the request is charitable and legally permissible. Donors may select the fund name. \$10,000 minimum.

**Agency Funds:** These funds are established by or for charitable organizations as a source of long-term endowment and annual income. Funds are named for the organization. \$10,000 minimum.

**Field of Interest Funds:** These funds create grants that meet needs in a particular area in Bartlesville that is of interest to the donor. For example, a family might create a fund to support the arts in the community each year. Donors may select the fund name. \$25,000 minimum.

The Foundation can also help you reach your charitable goals in other ways by providing planning and offering other tailored fund choices.

