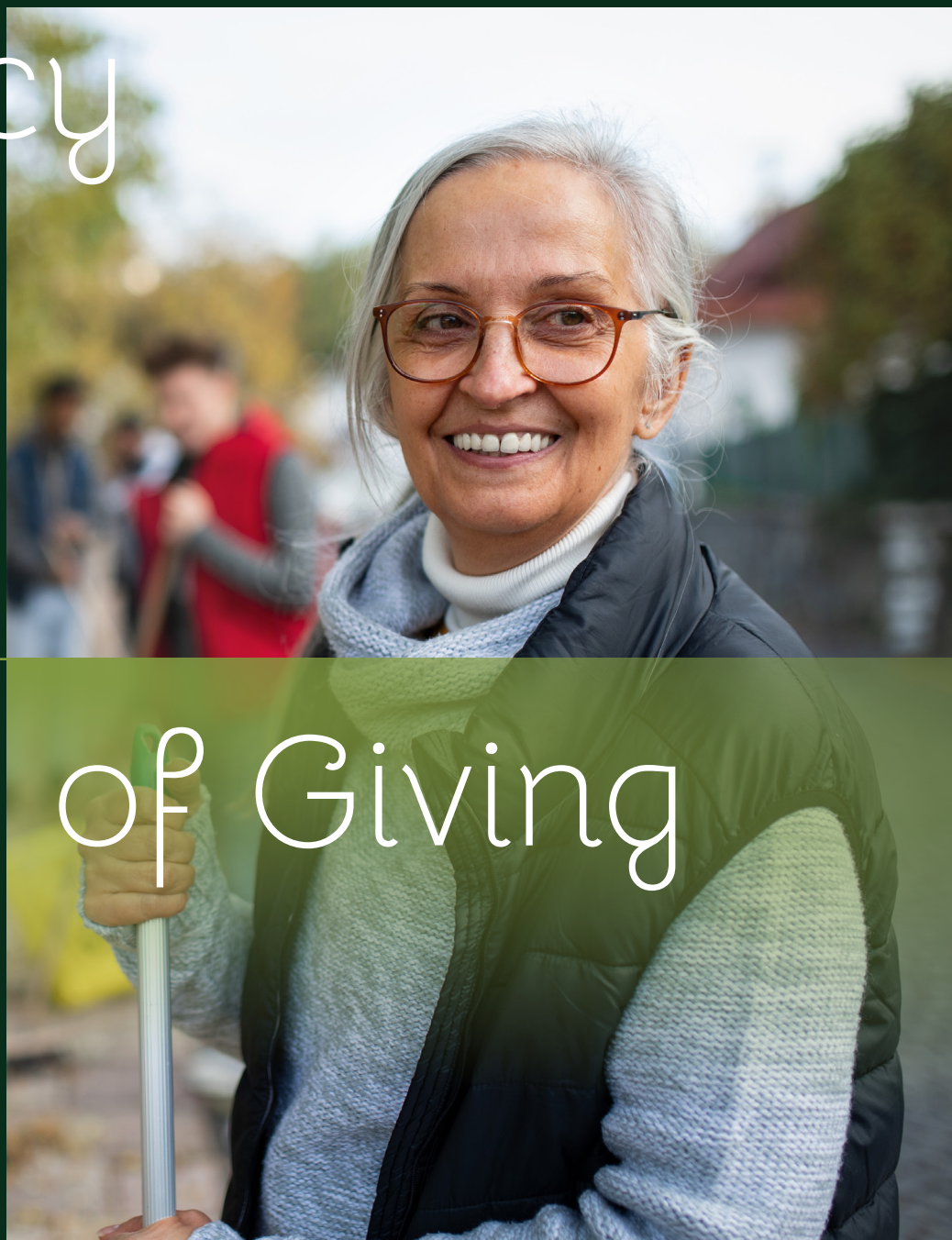


Orange County
Community
Foundation 

Create a
Legacy



of Giving

How do you want to be remembered?

What mark do you want to make with your life – not just today, but years, decades, generations from now? What progress do you dream of for your community, our nation, the world?

Since 1989, the Orange County Community Foundation (OCCF) has supported the philanthropic dreams of those who want to make a lasting difference during their lifetimes and beyond. In everything we do, we are driven by our mission to inspire a passion for lifelong philanthropy, faithfully steward the intentions of our donors and catalyze sustainable community impact.

We are honored to work with donors to steward legacies of generosity that will last for generations to come. Today, OCCF stewards more than 100 Legacy Funds for donors who have entrusted us to ensure their philanthropic vision lives on. Whatever your cause, whatever your desire for impact, OCCF offers options for creating your philanthropic legacy. Our flexible approach means your philanthropic intent will be honored and fulfilled, forever, exactly as you wish.





How it Works

At OCCF, we work with you to ensure that your philanthropic vision lives on under the careful stewardship of OCCF's professional team and Board of Governors. You can establish a named Legacy Fund with specific philanthropic guidelines to clearly articulate your charitable objectives, including assigning advisory rights to other family members or friends, designating specific organizations to receive annual support or identifying needs in the community you would like your fund to support.

While Legacy Funds and guidelines are established during your lifetime, granting will begin when contributions are received from your estate. Contributions to your fund can be made with any of the following:

- Real estate, business interests, securities and other appreciated assets
- Qualified Retirement Plan (401K, IRA)
- Charitable Remainder Trust
- Charitable Gift Annuity
- Life Insurance



The Thorne Family

"We live simply and want others to live more fruitful lives. We're fortunate to be in a position where we can think about our legacy — and establish a gift that will sustain the work of organizations we believe in to make a real difference."



We will work with you and your professional advisors to ensure your Legacy Fund supports the objectives of your overall estate plan. You will receive personalized support from OCCF during your lifetime and enjoy a wide range of resources including, deep knowledge of the local nonprofit sector, an understanding of the needs and issues facing our community, and access to Foundation events.

Benefits of a Legacy Fund

With careful planning, a Legacy Fund can be structured to encompass philanthropic, family and financial goals in the present and build a legacy of generosity that will grow for generations to come. Giving through an OCCF fund brings a wide range of benefits, efficiency and accountability:



It's Easy

Take comfort in knowing your Legacy Fund is established and ready to carry out your charitable wishes once your estate gift transfers to OCCF. You can diversify your gift for multiple causes through one simple process.



It's Flexible

You can modify your fund and plan future gifts on an ongoing basis without the effort and expense of revising your trust or will. Any changes you wish to make after establishing your philanthropic guidelines can easily be made, at no cost, by contacting OCCF.



It's Tax-Efficient

Charitable gifts minimize overall tax obligations related to your estate, and OCCF can accept a full array of assets to optimize estate tax planning.



It's Your Investment in the Future

Your gift can be invested for long-term growth and continue to have a lasting impact in the community, either in perpetuity or for an established period of years.



It Connects Your Family

You can name family members as advisors to your fund, transforming your legacy gift into a powerful tool for collaboratively engaging family and next generations through philanthropy.



What to Consider When Establishing Your Legacy

Whatever your motivations, we will work with you to consider these questions before opening a Legacy Fund:

1. What would you like to name your fund?
2. When your estate is realized, would you prefer a portion to be given to nonprofit organizations immediately or plan for long-term support?
3. Do you want your charitable giving to be permanent (endowed) or time bound (non-endowed)? If time bound, over what period (e.g. 10 years)?
4. Do you want any family members involved in making charitable decisions?
5. What are your areas of charitable interest (e.g. education, arts/culture, environment)?
6. Which community organizations have been meaningful to you and your family and have touched your lives in important ways?

“If you’re going to live, leave a legacy. Make a mark on the world that can’t be erased.”

– Maya Angelou



We're at Your Service

Your commitment to philanthropy can continue to grow through the most powerful gift of all: your legacy. Our team at OCCF is here to steward your charitable vision during your lifetime and beyond, ensuring that your heart for philanthropy lives on.

Thank you for consulting with us to create your own unique Legacy Fund. We would be honored to be part of your charitable planning.



**For more information
contact:**

Margita Blattner
*Senior Director of
Philanthropic Strategy*
949.464.4510
mblattner@oc-cf.org

 **Orange County
Community Foundation**



19200 Von Karman Ave., Suite 700, Irvine, CA 92612
949.553.4202 | oc-cf.org | ocnonprofitcentral.org

   
[@OCCCommunityFdn](https://www.instagram.com/OCCCommunityFdn)