



OWEN COUNTY COMMUNITY FOUNDATION  
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(812) 829-1725 [www.owencountycf.org](http://www.owencountycf.org)

*FOREVER GOOD*



# Legacy Giving

Your legacy can reflect what is most important and meaningful to you and serve as an inspiration to your loved ones and your community.

The Owen County Community Foundation can help you create a legacy gift that can support the wellbeing of the community you care most about.

## What are the different ways to create your legacy?

A legacy gift with the Owen County Community Foundation (OCCF) enables you to dedicate financial resources to your favorite charities or causes, and to do so in a way that fits your lifestyle, goals, and your family's financial situation. You can even create a permanent gift to charity that will also provide an income stream to you or your loved ones, often with tax benefits for you and your family. These are typically called planned gifts.



### Retirement Plans

Naming OCCF as a beneficiary of your IRA, 401k or 403b is a simple way to benefit the community while avoiding significant, often unanticipated taxes.



### Outright Bequests

You can make a bequest by including specific language in your will or living trust naming OCCF as the recipient of a testamentary gift.



### Charitable Gift Annuity

You can make a gift to benefit the community while receiving fixed payments for the life of one or two beneficiaries, regardless of the economic climate.



### Life Insurance



Including OCCF as a beneficiary of a life insurance policy, or assigning policy ownership to OCCF, can leverage small premium payments into significant community benefit.

# Legacy Giving *Continued*

## What are the benefits of creating my legacy gift through OCCF?

As the steward of charitable funds since 1994, OCCF's Board of Directors and staff provide expert oversight of gift policies, asset management, and grantmaking. Thanks to the generosity of legacy donors of all sizes through the years, OCCF is currently able to provide more than \$250K in grants each year from funds created through legacy gifts to support vital programs for the community.

## With your support, OCCF strengthens Owen County's nonprofit sector as a cornerstone of civic society by:

-  Developing locally-based, permanent charitable funds for Owen County communities.
-  Providing mentoring and leadership for nonprofit staff and volunteers.
-  Working with professional advisors on charitable gift planning.
-  Sustaining communications with Owen County's nonprofits and donors.



The Burns Family established the Burns Family Scholarship Fund in 2011 to provide support to Owen County students in perpetuity.

## Can I focus my philanthropy?

Absolutely, yes! Because philanthropy is intensely personal, it's important to match your desire to give with a community need that "speaks to you."

Your planning gift with OCCF can create a field of interest fund that will allow OCCF to give grants in the area you most care about. Or you can design a designated fund that will benefit one or several of your favorite nonprofits.

If you want to make a difference in the lives of students, you can establish a scholarship fund or contribute to an existing scholarship fund at OCCF. You can also donate an unrestricted gift to the Owen County Community Foundation, which allows OCCF to respond with the most flexibility to emerging needs in our communities.



## Owen County Community Foundation

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### How do I get started?

First, reflect on your community passions. As you consider what you want your legacy to be, keep in mind what you value now.

Then, contact Janet Rummel, President & CEO, at (812) 829-1725 or [ceo@owencountycf.org](mailto:ceo@owencountycf.org) and we will work with you to shape your gift plan.

[www.owencountycf.org](http://www.owencountycf.org)