

Oasis is all about growth.

Adults discover something wonderful by participating in Oasis: getting older can be all about growth.



Life's journey brings with it opportunities to redefine who we are, making aging joyful and impactful for ourselves and our community.



Become a part of the Oasis Legacy



Contact us to see Oasis programs in action and learn how a legacy gift could be the most important gift you ever make to the future of healthy aging. Our development staff is ready to assist you.

Contact:
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"One of the joys of giving is to be able to give back to an organization that I think is doing important work. Oasis provides an avenue for older adults to keep learning in a friendly environment. It is an important part of who I am."

Tom Henry, Oasis donor and volunteer



Legacy Circle

When you plan to GIVE, we can plan to GROW.





Oasis Legacy Circle: the future of healthy aging

Information below is for general purposes. For more detailed information, consult your tax advisor.



Type of Gift	Gift Amount	Generally Accepted Assets	Benefits	Tax and other Considerations
Bequest	Your Choice	Transfer of cash, securities, real estate or other assets	<ul style="list-style-type: none">You retain control of your assets during your lifetime.You may modify your bequest if circumstances change.You may designate how the gift will benefit Oasis.	<ul style="list-style-type: none">Gifts from your estate are exempt from federal estate taxes.
Named Fund	\$25,000 Minimum	Cash or securities	<ul style="list-style-type: none">A fund can be named in tribute to a loved one.You may designate how the gift will benefit Oasis.	<ul style="list-style-type: none">You receive an income tax deduction in the year you establish the fund, which can be carried forward up to five years if needed.Friends and family can contribute to these funds for an even larger impact.
Retirement Assets	Your Choice	401(k)s, 403(b)s, pensions and other qualified plans	<ul style="list-style-type: none">You can continue to make withdrawals during your lifetime.	<ul style="list-style-type: none">These assets transfer to spouses without taxation, but are heavily taxed when given to children and grandchildren.
IRA	Your Choice	IRA	<ul style="list-style-type: none">If you are 70 1/2 or older, you can direct your required minimum distribution to Oasis.	<ul style="list-style-type: none">You can donate up to \$100,000 with no tax liability.
Life Insurance	Your Choice	Life insurance policies	<ul style="list-style-type: none">Your gift is confidential and flexible.Proceeds are paid in cash and not usually tied up in probate.	<ul style="list-style-type: none">Your gift is tax deductible in most cases.
Gifts of Appreciated Securities	Your Choice	Stock market shares, bonds or mutual fund shares	<ul style="list-style-type: none">You may be able to give Oasis a larger gift than a regular cash gift.	<ul style="list-style-type: none">You are able to avoid capital gains taxes. In order to take the full appreciated value as a tax deduction, you must hold the security for more than one year.
Charitable Gift Annuity	\$25,000 Minimum	Securities or cash	<ul style="list-style-type: none">This option creates guaranteed income for you during your lifetime. The remainder goes to San Diego Oasis.	<ul style="list-style-type: none">Your guaranteed income is partially tax-deductible.
Charitable Remainder Trust	Best used for larger gifts	Securities or cash	<ul style="list-style-type: none">This option pays a fixed percentage of the trust's assets to you as valued annually for a term you specify; the remainder is distributed to Oasis.	<ul style="list-style-type: none">This type of gift creates an immediate tax deduction and guarantees payments to the donor.
Charitable Lead Trust	Best used for larger gifts	Securities or cash	<ul style="list-style-type: none">This option pays a fixed or variable income to Oasis for a time, then trust principal balance is transferred back to you or your loved ones.	<ul style="list-style-type: none">This gift reduces your taxable estate.The gift is given back to your family, often with a reduced gift tax.