



When you plan to give,
we can plan to grow



Become a part of the Oasis Legacy

*The importance of legacy gifts was
never more apparent than during
the pandemic.*

*The foresight, generosity and
investment of our Legacy Circle
members allowed us to continue
providing our members with the
programs they love while
safely sheltering in place.*

That is just one example of the significant impact legacy gifts make. Contact us to 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:

Jolyn Parker

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"One of the joys of giving is to be able to give 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

More Ways to Give

CURRENT GIFTS

Cash

A cash gift can be given in the form of cash, check or money transfer.

Life Insurance

Name San Diego Oasis as a beneficiary of a paid-up life insurance policy.

Stocks

Pay no tax on gain of appreciated stock, and receive income tax deduction for full value.

Real Estate

Avoid capital gains on land, investment properties and personal residence.

Tribute Gift

Honor someone special through a donation; tribute will be featured in a future catalog.

Vehicle Donation

It's just a simple call away: (877) 556-2747

AmazonSmile

Shop at smile.amazon.com/ch/30-0403895 and AmazonSmile donates to San Diego Oasis.

PLANNED GIFTS

Bequest & Estate Plan

Designate a specific amount or a percentage of your estate to San Diego Oasis.

Retirement Assets

Assign San Diego Oasis as a beneficiary of your retirement assets: (401(k), 403(b), IRA, pension and other tax-deferred plans.

Life Estate Reserved

Donor lives in the residence and receives an immediate deduction; San Diego Oasis receives the residence after donor's lifetime.

Charitable Gift Annuity

Get income for life and designate San Diego Oasis for remainder of the annuity.

Charitable Trusts | Remainder, Annuity, Lead

Charitable trusts benefit the donor while setting up San Diego Oasis to receive a gift.



A Legacy Gift is a meaningful way to ensure your personal values continue for years to come

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"> 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 72 or older, you can direct your required minimum distribution to Oasis. 	<ul style="list-style-type: none"> 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"> 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, cash or real estate	<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.

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