

## More Ways to Give

### 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

### 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.



## Become a part of the Oasis Legacy

*The foresight, generosity and investment of our Legacy Circle members allow us to continue providing our members with the programs they love and fulfilling our mission to at-risk students and seniors in need throughout the San Diego community.*

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:

**Simona Valanciute**

(619)846-3832 | [Simona@SanDiegoOasis.org](mailto:Simona@SanDiegoOasis.org)

*"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



When you plan to give,  
we can plan to grow



*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"> <li>You retain control of your assets during your lifetime.</li> <li>You may modify your bequest if circumstances change.</li> <li>You may designate how the gift will benefit Oasis.</li> </ul>	<ul style="list-style-type: none"> <li>Gifts from your estate are exempt from federal estate taxes.</li> </ul>
Named Fund	\$25,000 Minimum	Cash or securities	<ul style="list-style-type: none"> <li>A fund can be named in tribute to a loved one.</li> <li>You may designate how the gift will benefit Oasis.</li> </ul>	<ul style="list-style-type: none"> <li>Receive an income tax deduction in the year you establish the fund, which can be carried forward up to five years if needed.</li> <li>Friends and family can contribute to these funds for an even larger impact.</li> </ul>
Retirement Assets	Your Choice	401(k)s, 403(b)s, pensions and other qualified plans	<ul style="list-style-type: none"> <li>You can continue to make withdrawals during your lifetime.</li> </ul>	<ul style="list-style-type: none"> <li>These assets transfer to spouses without taxation, but are heavily taxed when given to children and grandchildren.</li> </ul>
IRA	Your Choice	IRA	<ul style="list-style-type: none"> <li>If you are 72 or older, you can direct your required minimum distribution to Oasis.</li> </ul>	<ul style="list-style-type: none"> <li>Donate up to \$100,000 with no tax liability.</li> </ul>
Life Insurance	Your Choice	Life insurance policies	<ul style="list-style-type: none"> <li>Your gift is confidential and flexible.</li> <li>Proceeds are paid in cash and not usually tied up in probate.</li> </ul>	<ul style="list-style-type: none"> <li>Your gift is tax deductible in most cases.</li> </ul>
Gifts of Appreciated Securities	Your Choice	Stock market shares, bonds or mutual fund shares	<ul style="list-style-type: none"> <li>You may be able to give Oasis a larger gift than a regular cash gift.</li> </ul>	<ul style="list-style-type: none"> <li>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.</li> </ul>
Charitable Gift Annuity	\$25,000 Minimum	Securities or cash	<ul style="list-style-type: none"> <li>This option creates guaranteed income for you during your lifetime. The remainder goes to San Diego Oasis.</li> </ul>	<ul style="list-style-type: none"> <li>Your guaranteed income is partially tax-deductible.</li> </ul>
Charitable Remainder Trust	Best used for larger gifts	Securities, cash or real estate	<ul style="list-style-type: none"> <li>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.</li> </ul>	<ul style="list-style-type: none"> <li>This type of gift creates an immediate tax deduction and guarantees payments to the donor.</li> </ul>
Charitable Lead Trust	Best used for larger gifts	Securities or cash	<ul style="list-style-type: none"> <li>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.</li> </ul>	<ul style="list-style-type: none"> <li>This gift reduces your taxable estate.</li> <li>The gift is given back to your family, often with a reduced gift tax.</li> </ul>

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

