OUR SERVICES

Empowering individuals and communities
to create positive change
INDIVIDUAL SERVICES

PHILANTHROPIC COUNSEL
We understand that you are unique—so are your goals and passions. When you become a donor, we work with you to create a customizable giving plan that achieves your philanthropic goals. We help with identifying and communicating your values, researching and suggesting nonprofits that align with your goals, planning your charitable legacy, and more.

BENEFITS
We can use our expertise to meet your charitable goals. There’s no need to reinvent this process when we are here to help.

DONOR ADVISED FUNDS
Funds established, for giving now or far into the future.

BENEFITS
The impact can be almost immediate, as can the tax benefit. You can make grant recommendations yourself or form an advisory committee of your choice to help in the decision process. The fund can grow tax free, allowing you to extend your giving into the future.

SCHOLARSHIP FUNDS
Provide an opportunity for direct impact through a scholarship that aligns with your priorities and values.

BENEFITS
Can be established with a variety of specific criteria: a field of study, geographic area, academic and financial requirements, etc.

PLANNED GIVING
Provides a channel to give through a charitable trust or other legal structure to accomplish your personal financial and philanthropic goals.

BENEFITS
Current cash flow while leaving a charitable legacy; may provide income and estate tax benefits.

BEQUESTS
Provides a giving opportunity through your estate plan which can include the transfer of various types of assets.

BENEFITS
Create a long-lasting legacy to maximize tax benefits to support the causes and organizations you care about most.

COMMUNITY LEADERSHIP

CONVENING
Communities Foundation of Oklahoma serves as a convener of philanthropic and community-minded individuals to collaboratively address community challenges and opportunities.

BENEFITS
When we come together, diverse voices can be expressed, and community issues can be identified and addressed in an effective and efficient manner.

COMMUNITY FUNDS
Allow charitably-minded people to pool resources with like-minded individuals to strengthen their community.

BENEFITS
Provides an annual distribution for use in the community named as the beneficiary. Communities across Oklahoma have found creative ways to grow their endowments so they now enjoy the benefit of substantial annual distributions from the accounts.

FIELD OF INTEREST FUNDS
Allow many individuals to pool their resources to impact one specific issue or project.

BENEFITS
These funds can rally like-minded individuals to pool funds and impact an issue area in a substantial way.

GRANTS OVERSIGHT AND ADMINISTRATION
For established funds, we offer administration of grant cycles, including development and reviews of grant applications, distribution of grant awards, and PR and marketing assistance to communicate your impact.

BENEFITS
We develop customized solutions to meet your philanthropic goals and can handle as much of the administrative detail as you want.

ORGANIZATIONAL SERVICES

AGENCY ENDOWMENTS
Provide a permanent endowed or quasi-endowed fund managed on behalf of a nonprofit organization.

BENEFITS
Provide a source of on-going, stable funding in perpetuity.

CORPORATE GIVING
We can help you align your corporate giving with your corporate values and offer several services, from grants administration to general giving counsel.

BENEFITS
We make corporate giving easy and accessible to businesses of all sizes by allowing customizable giving to reflect the advancement of the corporate brand.

SUPPORTING ORGS
Public charity with an on-going relationship with one or more public charities.

BENEFITS
Operate in a less restrictive regulatory environment than private foundations with the added benefit of donors having more control.

FOUNDATION MANAGEMENT
We can provide full-service management of your foundation, or we can just help you get started.

BENEFIT
Our legal and financial expertise can help you navigate this process and ensure that you meet legal obligations and your charitable goals.

FISCAL SPONSORSHIPS
An option that may be available for a project, short-term or on-going, that qualifies for tax-exempt status but applying for and maintaining separate tax-exempt status doesn’t make sense.

BENEFITS
This can be a valuable alternative that produces private and public efficiencies through shared administration while providing financial oversight.