Become a part of the Oasis Legacy Circle.

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:
Greg Lukeman,
314-862-2933, Ext. 235
glukeman@oasisnet.org

Lyndsey Reichardt,
314-862-2933, Ext. 240
lreichardt@oasisnet.org

“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

Before making a legacy gift of any kind to Oasis or other organization, consult your tax advisor.
# Oasis Legacy Circle: Impact the future of healthy aging

This information is for general purposes only. For more detailed information, consult your tax advisor.

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<th>Type of Gift</th>
<th>Minimum Gift</th>
<th>Generally Accepted Assets</th>
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<th>Tax and other considerations</th>
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| Bequest                    | Costs nothing now | Transfer of cash, securities or other assets | • You retain control of your assets during your lifetime.  
• You may modify your bequest if circumstances change.  
• You designate how the gift will benefit Oasis. | Gifts from your estate are exempt from federal estate taxes. |
| Named Fund                 | $10,000      | Cash or securities        | • You designate how this gift will benefit Oasis.  
• A fund can be named in tribute to a loved one. | 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 | • You may alter your gift amount at any time.  
• You can continue to make withdrawals during your lifetime. | These assets transfer to spouses without taxation, but are heavily taxed when given to children and grandchildren. |
| IRA                        | Your choice  | IRA                       | • If you are 70 1/2 or older, you do not have to take a minimum distribution. | You can donate up to $100,000 with no tax liability. |
| Life Insurance             | Your choice  | Life insurance policies   | • Your gift is confidential and flexible.  
• Proceeds are paid in cash and not usually tied up in probate. | Your gift is tax deductible in most cases. |
| Gifts of Appreciated Securities | Your choice | Stock market shares, bonds or mutual fund shares | • This option safeguards liquid assets so they can be used for immediate needs.  
• You may be able to give Oasis a larger gift. | 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    | $10,000      | Securities or cash        | • This option creates income for you during your lifetime. | This type of gift may create an immediate tax deduction. |
| Charitable Remainder Trust | Best used for larger gifts | Securities or cash        | • 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. | This type of gift creates an immediate tax deduction and guarantees payments for life. |
| Charitable Lead Trust      | Best used for larger gifts | Securities or cash        | • 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. | This gift reduces your taxable estate.  
• The gift is given back to your family, often with a reduced gift tax. |