



**OLDHAM COUNTY**  
community foundation

## TO SUPPORT AND PROMOTE OLDHAM COUNTY

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### WHO WE ARE

The Oldham County Community Foundation is dedicated to enriching the quality of life for all citizens of Oldham County by serving the charitable interests of donors who have established charitable funds as part of a permanent, collective, philanthropic resource for the current and future needs of the Oldham County community. The Oldham County Community Foundation was organized in 2010 to provide the services of a community foundation to local residents and to begin a collective charitable endowment for Oldham County.

The Oldham County Community Foundation strives to support local organizations through a competitive grantmaking program.

- In 2016, the Foundation granted \$26,735 to 13 nonprofit organizations.
- In 2017, the Foundation granted \$23,117 to 13 nonprofit organizations.
- In 2018, the Foundation granted \$23,325 to 14 nonprofit organizations.
- In 2019, the Foundation granted \$43,729 to 21 nonprofit organizations.
- In 2020, the Foundation granted \$32,532 to 11 nonprofit organizations.
- In 2021, the Foundation granted \$44,302 to 20 nonprofit organizations.
- In 2022, the Foundation granted \$46,354 to 17 nonprofit organizations.

The Oldham County Community Foundation is an affiliate of the Community Foundation of Louisville, a tax-exempt public charity that administers charitable funds created by individuals, businesses, and organizations for the betterment of their communities.

### WHAT WE OFFER

#### Personalized Service

We help donors establish charitable funds that support the causes and organizations they care about through a wide variety of gifts and giving strategies to maximize the impact of their giving.

#### Experience

When donors work with us, they have access to a team of professionals who will administer the fund in the most effective way possible to honor the donor's intent. We partner with our donors' professional advisors to help provide deep expertise in philanthropic giving to develop highly efficient giving approaches for their clients.

#### Knowledge

We help our donors learn more about local programs, organizations, and community need.

#### Legacy

Our donors become an important part of the future of their community. Through a fund, donors can support their interests to meet the current and future needs of their community and beyond.

# A Donor & Professional Advisor Resource

## Let Us Help You



Judi Petty  
Advisory Board Chair



Anne McKune  
Director of Philanthropy

**Organize and streamline giving.** Our charitable checking fund will help simplify giving and maximize tax savings. Donors can make gifts to a fund and received a tax deduction immediately and enjoy the freedom and flexibility of making distributions to their favorite charities whenever they wish.

**Preserve and grow charitable gifts.** Donors can create and build an endowment fund that will support their favorite nonprofit organizations or charitable interests — in their name — forever.

**Honor the lives and interests of loved ones.** Our services have proven to be helpful to donors who want to establish a scholarship fund or lasting memorial for a loved one or colleague to benefit the nonprofit organizations they supported during their lifetime.

**Plan a future gift to create a personal legacy.** A planned gift through a will, bequest or a life-income gift can ensure a brighter future for the community or a donors favorite charities. We can help donors record their personal wishes to support the causes they care about after their lifetime.

### SITUATIONS WHERE WE CAN HELP:

- Year-End Giving Under Time Constraints
- Estate Preservations Using Charitable Giving Tactics
- Giving of Unusual Assets
- Sale of Business — Charitable Tax-Saving Options

### TYPES OF ASSETS WE ACCEPT:

- Cash
- Stocks
- Bonds
- Bequest
- Real Estate
- Life Insurance
- Retirement Assets

## Would you like to know more about the Oldham County Community Foundation?

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Judi Petty, Advisory Board Chair | jpetty@iglou.com

The Oldham County Community Foundaiton is an affiliate of

