



# OLDHAM COUNTY

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## community foundation

## TO SUPPORT AND PROMOTE OLDHAM COUNTY

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### WHO WE ARE

The Oldham County Community Foundation (OCCF) 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 collective charitable endowments for Oldham County.

These endowment funds support local organizations through an annual competitive grantmaking program that has awarded more than \$300,000 since inception. In 2023, the Foundation granted \$40,000 to 21 local nonprofit organizations.

The Oldham County Community Foundation is an affiliate foundation 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

OCCF helps 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 philanthropy.

#### Experience

When donors work with OCCF, 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. Partnering with professional advisors, OCCF provides deep expertise in philanthropic giving to develop highly efficient giving approaches for their clients.

#### Knowledge

OCCF helps fundholders learn more about local programs, organizations, and community needs.

#### Legacy

Fundholders at OCCF have become an important part of the future of Oldham County. By creating a charitable fund, fundholders can support their philanthropic interests to meet the current and future needs of their community and beyond.

## A Donor & Professional Advisor Resource



**Judi Petty**  
Advisory Board Chair



**Kate Biagi-Rickert**  
Director of Stewardship

### Let Us Help You

#### **Organize and streamline giving.**

A Charitable Checking Fund or Donor Advised Fund simplifies your giving and maximizes tax savings. Donors make contributions to a charitable fund and receive a tax deduction immediately, enjoying the freedom and flexibility of distributing grants 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 and charitable interests – in their name – forever.

#### **Honor the lives and interests of loved ones.**

The services provided by the Foundation have proven to be helpful to donors who want to establish a Scholarship Fund or other lasting memorial fund for a loved one 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 life-income gift can ensure a brighter future for the community or a donor's favorite charity. The Foundation helps donors record their personal wishes to support the causes they care about after their lifetime.

#### **SITUATIONS WHERE OCCF 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
- Structuring life income gifts
- Charitable giving strategies for meaningful impact

#### **TYPES OF ACCEPTED ASSETS:**

- |                  |                                      |
|------------------|--------------------------------------|
| • Cash           | • Retirement Assets                  |
| • Stocks         | • Cryptocurrency                     |
| • Bonds          | • Personal Property/<br>Collectibles |
| • Bequest        | • Privately owned<br>business shares |
| • Real Estate    |                                      |
| • Life Insurance |                                      |

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

Judi Petty, Advisory Board Chair | [jpetty@iglou.com](mailto:jpetty@iglou.com)

Kate Biagi-Rickert, Director of Stewardship | 502.855.6942 | [katebr@cflouisville.org](mailto:katebr@cflouisville.org)

The Oldham County Community Foundation is an affiliate of



**Community  
Foundation**  
OF LOUISVILLE

