



Pathways Legacy Society Information

The *Pathways Legacy Society* honors and recognizes individuals who have included Pathways Adult Learning Center in their estate plans or made another form of planned gift. These commitments provide long-term financial sustainability and help ensure that our mission continues for generations to come.

Gift Options that Cost You Nothing to Make

Wills & Bequests

A gift through your will is one of the simplest and most meaningful ways to support Pathways. It costs nothing during your lifetime but creates a lasting impact for years to come.

A will is a legal document that ensures your wishes are carried out, your loved ones are cared for, and your assets are distributed according to your intentions. It also provides an opportunity to support the causes that matter most to you.

Bequests are flexible and can be tailored to your individual circumstances. You may modify your plans at any time as your needs change.

Types of Bequests:

- *General Bequest:* A gift of a specific dollar amount
- *Residual Bequest:* A gift of all or a portion of the remainder of your estate
- *Specific Bequest:* A gift of a particular asset (such as real estate or securities)
- *Percentage Bequest:* A gift of a percentage of your estate

Sample Bequest Language

Fixed Dollar Amount: I hereby give, devise, and bequeath \$ _____ to Pathways Adult Learning Center, a nonprofit organization located at 5202 S. Harvard Ave., Tulsa, OK 74135, EIN #: 47-0973687, for the general fund use and purpose.

Residual Bequest: I hereby give, devise, and bequeath to Pathways Adult Learning Center, a nonprofit organization located at 5202 S. Harvard Ave., Tulsa, OK 74135, EIN #: 47-0973687, all (or a certain percentage) of the rest, residue and remainder of my estate, both real and personal to be used for the general fund and purposes.

Specific Bequest: I hereby give, devise and bequeath (insert specific property) to Pathways Adult Learning Center, a non-profit organization located at 5202 S. Harvard Ave., Tulsa, OK 74135, EIN#: 47-0973687, for the general use and purposes.

Percentage Bequest: I hereby give, devise, and bequeath _____% of my estate to Pathways Adult Learning Center, a nonprofit organization located at 5202 S. Harvard Ave., Tulsa, OK 74135, EIN#: 47-0973687, for the general fund use and purposes.

Beneficiary Designations

Naming Pathways as a beneficiary of your retirement account, life insurance policy, or other financial assets is a simple and powerful way to provide future support.

Benefits:

- Costs nothing today
- Easy to set up or update
- Allows you to continue providing for your loved ones
- May reduce taxes and avoid probate

How It Works:

1. Request a beneficiary form from your financial institution
2. Name Pathways as a full or partial beneficiary
3. Submit the completed form.

Gift Options that May Provide Tax Benefits

Stocks and Securities

Donating appreciated stock may allow you to receive a charitable deduction while avoiding capital gains tax.

Stock Transfer Instructions

Retirement Accounts (IRA Gifts/QCD's)

If you are age 70 ½ or older, you may make a Qualified Charitable Distribution (QCD) directly from your IRA.

- Up to \$111,000 annually (per IRS guidelines)
- May reduce taxable income
- Can count toward Required Minimum Distributions (RMD)

Charitable Gift Annuity

A charitable gift annuity allows you to make a gift while receiving fixed payments for life.

Benefits:

- Lifetime income
- Potential tax deduction
- Meaningful future impact

Charitable Trusts

Charitable Remainder Trust

Provides income to you or your beneficiaries, with the remainder going to Pathways.

Charitable Lead Trust

Provides income to Pathways for a period of time, with remaining assets going to your heirs.

Living Trusts

A revocable living trust allows you to manage your assets during your lifetime while planning for future distribution. It can help avoid probate and provide flexibility in supporting both your family and charitable causes.

Donor Advised Funds (DAFs)

You can support Pathways through your donor-advised fund by:

- Recommending a grant
- Setting up recurring grants
- Naming Pathways as a beneficiary

We're Here to Help

To learn more about your intentions, please contact:

Pathways Adult Learning Center's Director of Development

☎ 918-859-0060 or 918-802-3796

Or our Planned Giving partner:

☎ 918-491-0079 or chris@tagpg.org

Through the Tulsa Community Foundation Planned Giving Partnership, you have access to complimentary, confidential estate planning services.

Already Included Pathways in Your Plans?

If you have already made a planned gift to Pathways, we would be grateful to know. Notifying us allows us to:

- Ensure your gift is honored according to your intentions
- Plan responsibly for the future
- Recognize you as an honored member of the Pathways Legacy Society

Please contact us confidentially at your convenience. We respect your privacy and will honor any request for anonymity.

Important Disclaimer

This information is for educational purposes only and should not be considered legal, tax, or financial advice. Please consult your professional advisor.