Steps to Naming Mighty Oaks Foundation as a Beneficiary

To help ensure the process is seamless and head off any unexpected complications, please contact Michael Hanson, Chief Financial Officer at 832-521-7323 x102 or email MichaelHanson@MightyOaksPrograms.org

1. SUPPORTING MIGHTY OAKS FOUNDATION

Include Mighty Oaks Foundation's Tax-Payer Identification Number **45-3159170** in your Estate Plan.

2. DETERMINE WHAT TYPE OF DONATION YOU WOULD LIKE TO GIVE TO MIGHTY OAKS

- Determine the amount of your gift
- Choose specific assets such as stocks, real estate, vehicles
- Allocate a percentage of your total estate

3. INCLUDE YOUR DONATION IN YOUR ESTATE PLAN

Wills and Living Trusts commonly include charitable donations that will go into effect upon your passing. Please include your donation requirement in your Estate Plan.

WHY YOU SHOULD INFORM MIGHTY OAKS FOUNDATION OF YOUR WISHES

It's not required to inform Mighty Oaks of a Charitable Bequest, but we would love to hear from you beforehand, and we would regret not having met you to build a connection and express our gratitude.

CONSULTING THE EXPERTS

Planned-giving experts can help you craft strategies for nearly any goal. For example, you may have stock you'd like to donate to a charity, but maybe you're relying on the dividends from that stock to cover your current living expenses. Planned-giving advisors can help create a strategy that may allow you to donate the stock now, while taking an immediate income tax deduction and still receive a stream of income from the stock for the rest of your life. There are some very powerful strategies that are often overlooked by donors. Some people hesitate to contact a charity because they don't want to draw any attention to themselves, or maybe because they are hesitant to commit to a donation now in fear of something changing in the future. But the truth is, we understand that situations change, and we understand if a donation needs to be adjusted or canceled for any number of reasons.