

The Ohio CPA Foundation is investing in the future

The Ohio CPA Foundation creates opportunities for students to:

- Get an inside look at the profession
- Meet CPAs and learn about career paths they may have never considered
- Be inspired to pursue an accounting degree and become a CPA
- Receive financial assistance to support them on their path to the profession

The Ohio CPA Foundation is committed to showcasing the accounting profession and all it has to offer. It's our mission to inspire students to follow in your footsteps and become the next generation of CPAs.

Learn more

The Ohio CPA Foundation is pleased to provide you with information about planned giving opportunities. For more detailed information and to determine what would be most advantageous to your specific financial and philanthropic goals, please contact your attorney or financial adviser.

For more information about the 1956 Legacy Society and how your gift to The Ohio CPA Foundation will make a lasting impact, we invite you to contact us at any time.

LEAVE A LEGACY

A brief guide to planned giving opportunities



How to contact us:

Phone: 614.764.2727

Email: foundation@ohiocpa.com

Web: ohiocpa.com/foundation



The Ohio CPA Foundation, the 501(c)(3) charitable affiliate of The Ohio Society of CPAs, is a GuideStar Exchange Gold Participant. EIN 31-6052485



**COMMIT TODAY.
IMPACT TOMORROW.**

"I prefer to be remembered for what I have done for others, not for what others have done for me."
- Thomas Jefferson



Investing in the Future

**COMMIT TODAY.
IMPACT TOMORROW.**

Your gift. Your legacy.

A planned gift to The Ohio CPA Foundation is a thoughtful way to ensure that the important work of the Foundation continues well into the future, all while establishing the legacy of your generosity and influence.

Perhaps you are nearing retirement and are thinking about how you want to be remembered for the impact you have made in your career. Or maybe you desire to help students follow in your footsteps but aren't sure how. For these and many other reasons, a planned gift to The Ohio CPA Foundation may be the vehicle for you to leave a lasting legacy.

Consider these options for a planned gift to The Ohio CPA Foundation

Bequest

A bequest is one of the most popular planned giving methods used by donors. It is a written statement in your will or living trust directing that specific assets, or a percentage of your estate, will be transferred to charity upon your death. Bequests can be for any dollar amount and made to any number of charitable organizations. We are happy to provide you with sample language should you choose to include a bequest to The Ohio CPA Foundation in your will.

Retirement plan or IRA

Naming The Ohio CPA Foundation as a beneficiary of a retirement plan or IRA can provide you with considerable tax savings, along with the ability to make a significant gift. This option merely involves obtaining

a beneficiary designation form from the retirement plan administrator and naming the Foundation as the entire, or partial, beneficiary of the plan's assets.

Life insurance

A gift of life insurance provides you the opportunity to make a gift at a sizable face value for a minimal outlay of cash. You may gift an existing policy, either fully paid or partially paid, or a new policy. Similar to a retirement designation, the proposed gift is accomplished by naming The Ohio CPA Foundation as a beneficiary of the policy on the beneficiary designation form.

These are just a few options for planned giving. More information and additional options can be found on our Planned Giving page at www.ohiocpafoundation.org. We also recommend speaking with a financial adviser regarding your specific financial and philanthropic goals.

Recognizing your commitment

By making a planned gift to The Ohio CPA Foundation, you become a permanent member of the 1956 Legacy Society. As a member, you will be recognized throughout your lifetime and beyond for your generosity. There is no minimum gift required for inclusion.



If you are interested in learning more, or if you have already included The Ohio CPA Foundation in your estate plans, we would love to hear from you. Please complete the attached form or contact us at (800) 686-2727 or foundation@ohiocpa.com.

I am/We are interested in learning more about planned giving and the 1956 Legacy Society. Please contact me/us.

I/We have already included The Ohio CPA Foundation in my/our estate plans through:

- Will or living trust
- Retirement or IRA
- Life insurance
- Other _____

I/We wish to be recognized as part of the 1956 Legacy Society. I/We wish to be listed as:

I/We have included The Ohio CPA Foundation in my/our estate plans, but I/we wish to remain anonymous.

Name: _____

Address: _____

Phone: _____

Email: _____

Please complete and return this card in the envelope provided or contact The Ohio CPA Foundation at **614.764.2727**.

All inquiries are treated in complete confidence and do not imply any obligation to make a gift.