

Mary Jo Hein

From: Nathan Hand <nhand@theoaksacademy.org>
Sent: Tuesday, December 10, 2019 6:59 AM
To: Mary Jo Hein
Subject: Turn stock into scholarships (and other year-end strategies)

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Maximize the impact of your generosity this year.

With so many amazing organizations to support this holiday season, make sure you are leveraging your gift to its highest potential.

We hope you find these giving strategies helpful. Share this with your advisor, friends and family as you consider how best to make a

difference for students in need at The Oaks Academy. Some strategies can be combined for an even greater impact.

If you're ready to make a direct gift now, [do so here](#).

Otherwise, read on!

Questions? Reply, call, or text Nathan Hand at 317-840-0730.

Thanks for giving generously and strategically to support The Oaks Academy!

1) SGO Tax Credit

Quite possibly the best "gift multiplier" available, a gift through this program qualifies for a 50% Indiana state tax credit. It allows you to give much more than you originally thought - potentially even tripling your impact for The Oaks! Your savings depends on a multitude of factors so work with your advisor for details.

This table shows example tax savings:

SGO Tax Credit Savings Potential			
your gift	\$1,000	\$5,000	\$10,000
your true cost	\$325	\$1,645	\$3,250

Make Your SGO Gift Now

2) Partner Program

A gift of \$5,000 provides The Oaks experience for one student for one school year. Combined with the above SGO program, you can give a child a full year of an Oaks education for around \$1700! We think you'll agree that's an incredible philanthropic impact for the dollar.

Partners receive regular updates about what students are learning, and invitations to special events to connect with school leadership and see firsthand what is happening in Oaks classrooms. Have a direct impact on students in need and truly enjoy your giving.

[Become a Partner](#)

3) Give Appreciated Stock

Turn your stock into scholarships for the greatest multiplying effect.

Appreciated stock gives you the most tax savings - especially when combined with the SGO Tax Credit mentioned above. You receive both the charitable deduction (based on the value on the gift date) and tax savings from capital gains. By donating, there's no tax (for you or The Oaks), plus a student in need receives The Oaks experience.

To give stock through the state tax credit program, start the process [online here](#). If you don't need or want the state tax credit, to gift stock directly to The Oaks, [begin here](#).

Stock gifts must be initiated by December 18 to ensure they qualify for year-end giving.

4) Wired Gift

One of the easiest ways to give, just reply to this email to receive the simple instructions. Important: let us know your wired gift is coming - as your name doesn't always appear on the transfer!

5) IRA Charitable Rollover

If you're 70 1/2 and older, the government requires you take a distribution from your IRA. However, you can gift all or part of that distribution to The Oaks, and you don't pay taxes on it as income. Simply cut a check payable out of the IRA to The Oaks Academy.

6) Endowment Gift (NEW)

These funds are invested and the returns support The Oaks in perpetuity. For details on making an endowment gift to ensure the long-term impact of The Oaks, contact Nathan Hand, Chief Advancement Officer, at 317-840-0730 or nhand@theoaksacademy.org.

7) Legacy Gift

Have you named The Oaks Academy in your will or estate? To do so,

you may need our EIN #35-2050595. If you have, simply let us know and you'll join our Legacy Society. There are often additional details and strategies to discuss with this type of gift. When ready, contact us to begin the conversation.

8) Make a Simple, Direct Gift

You can always give [online](#) or mail a check to:

The Oaks Academy
c/o Nathan Hand
2301 N. Park Ave
Indianapolis, IN 46205

Thanks for giving generously and strategically this holiday season. If you have questions or want to talk through these options, call, text or email anytime:

Nathan Hand
317-840-0730
nhand@theoaksacademy.org



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