

DONOR-ADVISED FUND



Thank you for considering supporting Sunbeam Family Services through a Donor-Advised Fund donation! Donating through a DAF is an intentional and impactful way to build brighter futures while benefiting from potential tax advantages.

What is a Donor-Advised Fund (DAF)? Think of a DAF as a generous individual's charitable savings account, managed by a sponsoring organization (Oklahoma City Community Foundation, for example). You receive a tax deduction for any money or assets that you contribute to your DAF. The sponsoring organization issues an acknowledgement for such gifts with all the appropriate tax language. The sponsoring organization invests these funds to increase their value over time and create maximum giving power for the donor. The donor, or persons that may have been named as advisors by the donor, recommend grants to eligible nonprofits like Sunbeam and the Community Foundation sends checks on your behalf.

One way is to contact Oklahoma City Community Foundation at <https://occf.org/giving/how-to-give/> or call (405) 235-5603. They can help you make a grant to Sunbeam Family Services.

GIFTS VIA WIRE OR ACH



We're incredibly grateful for the generosity of donors like you. To donate, your bank can wire funds directly to Sunbeam. Please contact Angie Doss at adoss@sunbeamfamilyservices.org or call (405) 609-2311.

GIFTS OF STOCK & SECURITIES



To make a gift of stock or other securities, please complete use the Stock Broker Form and contact Angie Doss at adoss@sunbeamfamilyservices.org or call (405) 609-2311

DONATE VIA YOUR IRA



If you're age 70½ or older, this tax-friendly donation option supports our mission while reducing the income and taxes from your IRA withdrawals. It's a win-win: you benefit financially while supporting the essential work of Sunbeam!

Benefits of an IRA Charitable Rollover:

- **Tax-Free Distribution:** You can transfer up to \$105,000 annually from your IRA directly to a qualified charity like Sunbeam Family Services without the amount being included in your taxable income. This means you can give more to charity without increasing your tax burden.
- **Fulfills Required Minimum Distributions (RMD):** Once you turn 73, the IRS requires that you withdraw a certain amount each year from your traditional IRA. An IRA charitable rollover can satisfy all or part of your RMD, which could otherwise be subject to regular income tax.
- **Reduces Taxable Income:** By transferring funds directly to charity, you can lower your adjusted gross income (AGI), which can also reduce the impact of other tax considerations, like Medicare premiums and the taxation of Social Security benefits.
- **No Impact on Charitable Deduction Limits:** IRA rollovers do not count toward the usual limits on charitable deductions (typically 60% of AGI). This can allow donors to give beyond what they would normally be able to deduct if making cash contributions.

How an IRA Charitable Rollover Works:

1. Reach out to your IRA administrator to request a gift transfer to Sunbeam Family Services.
2. Your IRA funds will be transferred directly to support Sunbeam's mission.
3. Please note: IRA rollover gifts do not qualify for a charitable deduction, but they offer other tax benefits.
4. Let us know if you'd like to support a specific area of our work with your gift.

If you have questions or would like assistance in making an IRA charitable rollover gift, please reach contact Angie Doss at adoss@sunbeamfamilyservices.org or call (405) 609-2311. We're here to help!



IN-KIND DONATIONS



Host an In-Kind Donation Drive

For more information on hosting an in-kind drive, contact Angie Doss at adoss@sunbeamfamilyservices.org.

Non-Perishable Foods:

Snacks for Kids (fruit snacks, vegetable puffs)

Cereal

Pasta or Rice

Spaghetti sauce

Canned chicken or tuna

Saltine crackers

Mac & Cheese

Jiffy corn bread

Kids Juice Boxes/Pouches

Peanut butter (jar and individual)

Non-Food Items:

Diapers (all sizes)

Laundry pods

Small dish soaps

Body wash

Shampoo

Body lotion

Dryer sheets

Deodorant

Toothpaste

Feminine Hygiene Supplies

PLANNED GIVING



Planned Giving - Building Brighter Futures Legacy Circle

How to Designate Your Legacy Gift in Support of Sunbeam Family Services

Thank you for your partnership and the care you help provide for children and families in our community. When you decide to include Sunbeam Family Services in your estate plans, you will become a Building Brighter Futures Legacy Circle member. You will join a group of compassionate leaders committed to making a lasting impact through legacy giving.

Your help provides vital resources to serve more children and families in our community. And those families will remember and celebrate your generosity, inspiring others to follow your leadership and continue the legacy of care.

You can make a bequest to Sunbeam Family Services in the form of cash, securities or properties, and you can name Sunbeam Family Services EIN 73-0590119 as a beneficiary of your retirement plan, life insurance policy, or “Transfer on Death” brokerage accounts. Please consider listing Sunbeam Family Services as the beneficiary recipient.

Download and review the Building Brighter Futures Legacy Circle information and letter of intent [here](#). If you have any questions, please contact Angie Doss at adoss@sunbeamfamilyservices.org or (619) 347-4057.

GIVE TO ENDOWMENT



Make a donation in support of Sunbeam's Endowment. Visit [Oklahoma City Community Foundation](#) or call (405) 235-5603.

[Learn more and connect with OCCF.](#)

DONATE YOUR CAR



Donating your car to Sunbeam Family Services is a great way to support our mission.

Here's how it works:

1. Visit the website: Sunbeam Car Donation.
2. Fill out the form: Provide some basic information about your car.
3. Schedule a pickup: They will come to pick up your car for free.
4. Get a tax receipt: You will receive a receipt for your donation, which you can use for a tax deduction.

If you have any questions, you can visit their website or contact them for more information. Thank you for considering a car donation to Sunbeam Family Services!