Oakwood Church "Ways to Give"

oakwoodnow.org/give

Updated November 2026

Stocks, bonds, and mutual funds

Have your securities appreciated greatly since you purchased them?

By donating publicly-traded **stocks, bonds, or mutual funds that have appreciated for more than one year**, your donation can go *up to* 20% further than if you sold the stock and then made a cash donation because you avoid capital gains taxes.

Contact Steve Sensiba at CRG Services (Steve.Sensiba@crgservices.com) to set up direct transfers to Oakwood's brokerage account.

IRA qualified charitable distributions (QCDs)

If you're **age 70½ or older**, you can transfer money directly from your IRA to Oakwood tax-free, up to $111,000 ($222,000 for married couples) in 2026.

A QCD counts toward your annual required minimum distribution (RMD) if it comes directly out of your IRA.

By donating a portion of your IRA directly to Oakwood, your donation can go *up to about* 45% further than if you sold the IRA and then made a cash donation, because you avoid any federal and state income taxes.

Since Oakwood is a tax-exempt 501(c)(3) organization, it does not pay income tax on the donation.

Have your IRA provider send funds directly to Oakwood:

- Ask them to include your name and indicate that the gift is an IRA QCD.
- Note a designation: General Budget, Benevolent Fund, Global Partners, etc.
- Mailing address: Oakwood Church, 3041 Oakwood Rd, Hartland, WI 53029

Please **notify Financial Secretary, Dan Ertel**, via give@oakwoodnow.org so he can match the donation to the donor.

Donor-advised funds (DAFs)

A DAF is like a charitable investment account that can be used exclusively to support charities you care about. **Instead of donating multiple blocks of stock to multiple charities, you make one donation, which is used to fund your Giving Account** (fees may apply).

There is one form to file with your tax return instead of many. You take a tax deduction right away (if you itemize deductions, subject to certain limitations) and **recommend grants to charities (including churches)** over time.

Log into your DAF account provider and recommend a grant to:

- 501(c)(3) legal name: Oakwood Church
- Tax ID: 39-1633893
- Note a designation/purpose: General Budget, Benevolent Fund, Global Partners, etc.
- Mailing address: Oakwood Church, 3041 Oakwood Rd, Hartland, WI 53029

Please **notify Financial Secretary, Dan Ertel**, via give@oakwoodnow.org so he can match the donation to the donor.

Land/real property, mineral acres, and other more complicated gifts

Must be approved by the Elder Board prior to any gifting.

Please **reach out to Elder Board Chairman, Greg Mandigo,** whose email can be found at bit.ly/OakwoodElderBoard or via give@oakwoodnow.org

Legacy and estate planning gifts

Must be approved by the Elder Board prior to any gifting.

All year-end giving needs to be received or postmarked by December 31 in order to qualify for a tax deduction in that giving year.
This is not intended or implied to be a substitute for professional financial and/or tax advice. Please speak with your bank, financial advisor, and/or tax professional about your specific situation.

Email give@oakwoodnow.org | Phone (262) 367-1212