MY GIFT TO THE WORLD
MY LEGACY. MY LIFE.
For more than 50 years Oxfam has received support from many thoughtful individuals who—through financial and estate planning—have helped us address the inequality of poverty and create a brighter future for people in some of the world’s most vulnerable communities.

If you are considering including a gift to Oxfam in your will, trust, or through a beneficiary designation, it’s important to know that most gifts enable you to:

- Keep control of the asset for as long as you need it.
- Direct a percentage of the asset to Oxfam as a contingent beneficiary. That means Oxfam is second in line after your primary beneficiary.
- Allocate any amount you choose. Every gift makes a difference.
- Change your mind. The beneficiary forms that designate who inherits an asset can be modified as your situation changes, often at no cost.

Oxfam is fighting to end the injustice of poverty worldwide

Oxfam is a global organization that helps people build better futures for themselves, holds the powerful accountable, and saves lives in disasters. Our mission is to tackle the root causes of poverty and create lasting solutions.

When you include a gift to Oxfam in your will or trust, or through an IRA or other beneficiary designation, or establish a life income gift, you create a lasting legacy that communicates your values and your dreams for the future.
Where there’s a will

Perhaps you are just beginning to think about your future plans. Or maybe your family or other circumstances have changed, and you realize that it’s time to update your plans to reflect your current needs and wishes. Many people choose to include a gift in their will to organizations and causes that are meaningful to them while balancing the financial needs of their family. A gift through your will or trust is a time-honored way of ensuring that your support for Oxfam continues for generations to come. You may be surprised to learn that these gifts:

- Require no immediate donation. The gift comes to Oxfam only after your lifetime.
- Maintain your ability to change your mind at any time.
- Are gratefully welcome in any amount.

You have several options:
- Give a specific amount
- Give a percentage of your estate
- Give what’s left after you have provided for your loved ones

To make a gift to Oxfam, we hope you will consider using this language:

For a bequest

I give [____ percent of my estate, or description of asset, or ____ dollars] to Oxfam America Inc., 226 Causeway Street, 5th Floor, Boston, MA 02114 (tax ID 23-7069110), for its general use.

Honor a loved one

If there is a loved one who has inspired you in life—perhaps nurturing your passion for social justice—you can make a gift to honor or memorialize them.
Many assets can be used to make a meaningful gift to Oxfam; often, you can express your values simply by signing your name. Following are some of these assets (often called transfer on death [TOD] or payable on death [POD] assets):

- Retirement plan funds
- Life insurance policies
- Certificates of deposit, bank and brokerage accounts, and other financial accounts
- Donor-advised funds

**Gifts of retirement plan assets**

Many of us have sacrificed to accumulate retirement savings in expectation of a long and comfortable retirement. Most retirement plans are subject to income and possibly estate taxes when transferred to loved ones other than your spouse. That’s why retirement plan funds are such a popular option for including a gift to a charity such as Oxfam.

If you designate Oxfam as a beneficiary of your retirement plan, you can do the following:

- Designate other, less heavily taxed assets to your family.
- Take action without the expense of an attorney. Simply request a change of beneficiary form from your plan provider and include Oxfam as a full or partial beneficiary.
- Change your beneficiaries at any time, retaining maximum flexibility.

We are tax-exempt, so your entire gift will go to Oxfam.

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**“Oxfam is our first and greatest love.”**

**STEPHEN AND JANE LAND**

Legacy Circle members Stephen and Jane Land listed Oxfam as a beneficiary of their retirement account. They are preserving the ideals that attracted them to Oxfam in 1973: self-reliance, local control, focus on social justice, and willingness to self-question. The Lands also appreciate Oxfam’s ability to act independently and speak truth to power. “Oxfam amplifies the voices of marginalized people. We can’t think of a better way to reflect our values.”
Life insurance plans
Most people use their life insurance policies to provide financial security for a spouse, child, or other loved one. But over time, the needs of your family may change. A life insurance policy that has outlived its purpose or needs updating may be the perfect way to make a gift to Oxfam. Just ask your insurance company for the appropriate forms to make Oxfam the owner or beneficiary of the policy. You may also name us as a contingent beneficiary, so the policy passes to us only if your family members predecease you.

CDs and financial accounts
One of the simplest ways you can help ensure Oxfam’s future is by making us the pay on death (POD) or transfer on death (TOD) beneficiary of a certificate of deposit (or any bank or brokerage account, for that matter). Your financial institution can assist you and will provide an easy-to-complete form.

Funds remaining in your donor-advised fund
The final distribution of contributions remaining in your donor-advised fund after your lifetime can be designated when you create your fund or update your fund succession plans. Please consider naming Oxfam as a beneficiary of your account. You may even designate us to receive a portion of the account value, leaving the remaining portion for your children or grandchildren to continue your philanthropic legacy.

To make any of these gifts, you will need our legal designation and tax ID number:
Oxfam America Inc.
Tax ID 23-7069110
226 Causeway Street, 5th Floor
Boston, MA 02114

Advocating for systemic change
TITO AND LAURA MEYER
“We support Oxfam because of the important work it does all over the world. Not only does Oxfam provide emergency relief, Oxfam concentrates on bringing long-term solutions to hunger and poverty. The thing that convinced us to become legacy donors is that Oxfam also advocates for change at the governmental level.”
The Legacy Circle

Contact us to explore your charitable planning options and to learn more about how they can benefit you and Oxfam. If you have already made a gift for Oxfam, we hope you will let us know. We welcome the opportunity to recognize you now for your future gift by welcoming you into the Legacy Circle, our way of recognizing the exceptional individuals who have made Oxfam a part of their lasting legacy.

The Legacy Circle recognizes and honors those who have thoughtfully provided for Oxfam through their estate and financial plans. There are no fees or dues associated with membership in the Legacy Circle. As a member of the Legacy Circle, you will enjoy the following:

- An invitation to an insider teleconference briefing with Oxfam America’s president
- *Oxfam CloseUp* (Oxfam’s twice-yearly member magazine)
- Recognition in our Legacy Circle honor roll

Before making a gift to Oxfam, you should consult with your financial, tax, and legal advisors for an analysis of your individual situation to decide which of these ways of giving might work best for you.

For assistance in crafting your personal legacy, for more information, or to notify us that you have left a gift for Oxfam in your will, please contact:

**Tim Rogers**
Planned Giving Officer
Email: legacy@oxfamamerica.org
Phone: (800) 776-9326, ext. 2723

### Always looking out for those less fortunate

**IDA WHEELER**

California donor Ida Wheeler, who died at 105, left Oxfam in her plans. Over her lifetime, she took numerous trips overseas and gained an appreciation for the challenges facing women in India, South Africa, and elsewhere. According to her niece Connie Waldeck, Ida was frugal and not concerned about comfort in her golden years—all she cared about was giving to others. “I didn’t save for myself,” Connie remembers Ida saying, adding, “Auntie quietly gave to many different charities. She cared very deeply about the charities that she supported.”
Our commitments to you

WE WILL RESPECT YOUR PRIVACY. We will keep your gift anonymous if you wish.

YOU CAN CHANGE YOUR PLANS AT ANY TIME—you are not obligated by a decision you make today.

WE WILL USE YOUR GIFT IN THE WAY YOU INTENDED.

WE WILL CONTINUE TO MEET THE HIGHEST STANDARDS of ethics and financial transparency in order to remain worthy of your legacy.
COVER PHOTO: Chan, 25, is an unemployed domestic worker in Dhaka, Bangladesh. When the pandemic started, she and her husband lost their jobs. “I used to work in two to three houses as a housemaid,” she said. “I usually earned 3,000 taka [$35] a month. All our money would go to our house rent, our daughter’s education, and food.”

Due to the pandemic, many families in Dhaka struggled to pay rent and to eat more than one meal a day. Then in July, Chan’s family received food aid distributed by Oxfam partner Nari Maitree. “This food aid is like God’s gift to me,” said Chan. “I am able to cook in the morning and feed my daughter. My daughter’s breakfast today was a biscuit. This food is saving us from starvation.”

PHOTO: Fabeha Monir / Oxfam