

TAUW Launches New Women United

Women United is the new name of an organization of nearly 1,000 women who volunteer their time and make financial contributions to the Tulsa Area United Way.

Women United is the new iteration for the Women's Leadership Council, which has been a part of the local United Way for seven years.

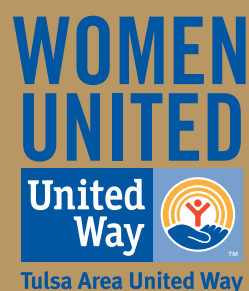
We believe this new name better captures the mission of the organization and will position Women United for growth in the years ahead.

The organization's new name and structure was unveiled to members at the organization's annual summit this summer. The summit featured keynote speaker Jean Kelley, author of the book "Dress like a Million from Goodwill."



The refreshed organization has adopted new membership giving levels, starting at \$250 a year. Each level includes various benefits such as personal and professional development, networking opportunities, partner agency tours and volunteer opportunities.

As a female member of the Alexis de Tocqueville Society, you are automatically a member of Women United. However, if you would prefer to "opt out" of your membership in Women United, you may do so by contacting Laura Bell at lbell@tauw.org or 918-295-6618.



Donor-Advised Fund Allows Multi-Year Gifts

Establishing a donor-advised fund will allow members of the Alexis de Tocqueville Society to lower their tax bill while maximizing charitable contributions, says Tocqueville member Jana Shoulders.



Shoulders is Managing Partner of Mariner Wealth Advisors in Tulsa.

Donor-advised funds are becoming increasingly popular methods of giving to charity and often result in significant tax savings and larger contributions to the non-profit organization, Shoulders said.

Donor-advised funds may be established through the Tulsa Community Foundation or your financial adviser.

In addition, Tocqueville members may give multi-year gifts, which also can result in a significant tax savings by "bunching" deductions into one year.

Further savings can be realized by gifting appreciated shares of stock to avoid paying capital gains tax, she said.

Donating Stock May Help Get You a Bigger Tax Break

Is it better to give stock or cash to a non-profit organization? The best strategy depends on whether the stock has increased or decreased in value since you bought it and whether you have owned it for more than a year.

1. Giving appreciated stock you have held for more than a year is better than giving cash. If you donate stock that has increased in value since you bought it more than a year ago – and if you itemize deductions – you can take a charitable deduction for the stock's fair market value on the day you give it away. You will also avoid capital gains taxes on the increase in value over time, which you would have had to pay if you sold the stock then gave the charity the cash proceeds. You can deduct the fair market value only if you hold the stock for more than a year before giving it away. If you have held it for less than a year, your deduction is limited to your cost basis – what you paid for the stock – not the current value.

2. If it is a losing stock, it is better to sell it and give the cash. If the stock has lost value, it is better to sell the stock first and give the cash to the charity. You will still be able to deduct your charitable donation if you itemize, but you will also be able to take a capital loss when you sell the investment.

3. Ask the charity and brokerage firm about the procedure and timeframe for giving stock. Most banks and brokerage firms require a letter of instruction or letter of authorization to transfer the shares to charity, and a mutual fund company may have a special form.

4. You can buy extra time with a donor-advised fund. If you would like to transfer shares when the value reaches a certain level but want extra time to decide which charity to support, you could give the stock to a donor-advised fund. You usually need \$5,000 to \$10,000 to open a donor-advised fund at a brokerage firm, mutual fund company or community foundation, such as the Tulsa Community Foundation.

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Alexis de Tocqueville Society

TULSA AREA UNITED WAY | SUMMER 2018

Fall Reception Sept. 11 at Home of Kathy Taylor & Bill Lobeck

A first glance at a spectacular new Tulsa home is a hallmark of the Alexis de Tocqueville Society. This year is no exception.

The Alexis de Tocqueville Society will hold its annual fall reception in a modern marvel – the home of Kathy Taylor and Bill Lobeck.

"We are so honored to be welcomed into Kathy and Bill's new home," says Marcia MacLeod, 2018 Chair of the Alexis de Tocqueville Society.

The event will be held from 5:30 to 7:00 p.m. on Tuesday, Sept. 11. Look for your invitation in the mail very soon.

The home, at 2532 E. 38th St., complements the existing scale and character of the neighborhood, according to Taylor. Simplicity is the key objective in the design criteria. Light, air and landscape views are significant in both the home's placement on the site and the overall design concept.

"The home provides the perfect backdrop to celebrate friendships and support the community," Taylor says.

FALL RECEPTION



Tocqueville members will gather at one of Tulsa's most amazing new residences on Sept. 11.

Field of Dreams: Team Tocqueville v. Emerging Leaders

When was the last time you played a game of softball?

This year, for the first time, members of the Alexis de Tocqueville Society will field a team to play against members of the Tulsa Area United Way's Emerging Leaders Society.

The first AdT-ELS Softball Game will be held under the lights of the TU softball field on Tuesday, Sept. 25. The first pitch will be thrown at 6:00 p.m.

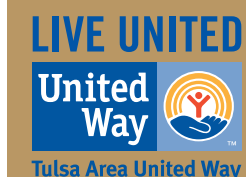
The game will serve as a recruiting and social event for our Emerging Leaders, allowing them to meet and network with AdT members.

"We'd like to encourage AdT members to participate in the game – let's show support for our emerging leaders, who are tomorrow's Tocqueville members," says Marcia MacLeod, 2018 Chair.

Spectators are also welcome to provide moral support, or in some cases, pinch hit, she added.

Food trucks, craft beer and entertainment will round out the evening.

To be a part of Team Tocqueville, contact Laura Bell at lbell@tauw.org or 918-295-6618.



Alexis de Tocqueville Society
of the Tulsa Area United Way

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Letter from the Chair

Many members of our Alexis de Tocqueville Society have been with us for 20 and even 30 years. To our Loyal Leadership, we are grateful for your long-term commitment.

To our new members, welcome to one of Tulsa's most enduring, and may I say, consequential philanthropic organizations.

To our prospective members (many of whom will receive this newsletter), we would like to invite you to join us as we strive to make the Tulsa area a better place to live. Recently, many of you have asked, "Why should I join the Tocqueville Society and support the United Way?"

Allow me to present several compelling reasons to join the Tocqueville Society or to increase your contribution this year:

First, our United Way is in the best position to respond to community-wide challenges that involve collaborations between several organizations (see story below about the recent school closures).

In addition, you can be certain that your contributions will be invested wisely – each year, 200 highly trained volunteers carefully

analyze all funding requests to ensure effective and efficient responses to vital community needs. In other words, we do the research to ensure your dollars will make a difference.

Finally, new energy and growth is occurring in much of Tulsa, including downtown revitalization and a world-class park. However, not all Tulsans are sharing in this prosperity. Our economic growth, safety and quality of life could be threatened by poor social conditions such as higher-than-average rates of poverty and crime.

It's essential that we invest more in our community to maintain the quality of life we all enjoy, and to expand that sense of safety and security to more of our fellow citizens. Our United Way is the only organization that can provide that broad support.

This year, our overall goal is to increase membership in the Tocqueville Society by 10 percent. Our Tocqueville Committee recently met and adopted four additional goals: retain more members, expand membership in the Step-Up program (including young professionals), attract more major gifts (defined as \$25,000 and above) and adopt a rigorous recruitment program.

In the coming weeks, we will be reaching out to many of you to ask for your help in reaching some of these goals. I hope you will "say yes" as I did. It is time for us to give just a bit of time as well as contributing financially.

Thank you again for your generous support – together, we are going to transform Tulsa into a place where everyone can experience a high quality of life.

Marcia MacLeod
Alexis de Tocqueville Society Chair, 2018



More than 60 members of the Alexis de Tocqueville Society recently had a front-row seat to Tulsa Tough, Tulsa's most dynamic sporting event, from the comfort of the McBirney Mansion, including a fabulous brunch. A very special thank you is extended to our hosts, Tocqueville members Wendy and Gentner Drummond.



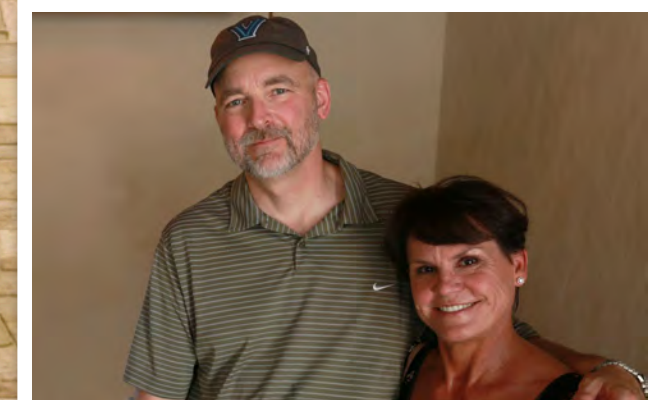
Joe and Angie Gottron, Wendy and Gentner Drummond



Wendy Drummond, Chris Murphy, Gentner Drummond, and Ben Stewart



Shelly and Derek Martin



Joe Crivelli and Holly Bazan

School Closure Response 'Quick, Effective, Collaborative'

The response to school closures during the recent teacher walkout was a tremendous success by all accounts.

Hours after potential closures became likely, the Tulsa Area United Way convened key partners to respond to the needs of students and parents.

Within a few days, partners launched into action, a web portal listing all support services was developed, and food and activity sites were designated.

When the 11-day walkout occurred, the community was ready to provide students what they needed: meals, educational activities and transportation.

This was an amazing community-wide response that has provided us with a much-needed template to respond to future challenges, including disasters. All organizations played to their strengths – for example, the United Way served as convener, Hunger Free Oklahoma coordinated meal sites, and the Community Food Bank of Eastern Oklahoma provided food.

SUCCESS BY THE NUMBERS:

- 93 organizations came together
- 11,558 students served at 182 sites
- 32,235 meals
- 1,600 volunteers worked 22,885 hours for a total value of \$552,444



Kirsten and Mark Graham, Marcia MacLeod, and Bill and Beverly Kellough



Mark Farrow, Rob Martinovich, and John Hewitt