

SEEING FIRSTHAND
HOW A GIFT CHANGES
LIVES AND BRINGS JOY
TO OTHERS CAN
CHANGE THE LIVES OF
THOSE THAT GIVE.

Most of us experience this through the eyes of a child, the gratitude of a life changed, or through philanthropy.

A charitable gift can have many benefits beyond just helping charity. Strategies like the charitable gift annuity provide many reasons to give. The goal of this brochure is to explain the benefits of a charitable gift annuity.



RATES FOR ONE LIFE CHARITABLE GIFT ANNUITIES

AGE	RATE
60	3.9
65	4.2
68	4.5
70	4.7
72	4.9
74	5.2
76	5.6
78	6.0
80	6.5
82	7.0
84	7.4
86	7.8
88	8.2
90	8.6



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THE CHARITABLE GIFT ANNUITY

In Giving,



You Receive.

THE CHARITABLE GIFT ANNUITY IS A PLANNING TOOL THAT RECOGNIZES THE REWARDS OF GIVING BEGIN WITH THE DESIRE TO MAKE A GIFT.

To create a charitable gift annuity, you transfer an asset to charity. In return, the charity agrees to make payments for life to you, you and a loved one, or another person. Each payment is fixed and the amount of each payment will depend on the age of the person who receives the payments.

See the table provided on the back or contact us for your personal rate.



GIFT ANNUITY FROM STOCK

While a gift annuity can be funded in a number of ways, let's examine the benefits of transferring appreciated stock to charity.

The gift annuity graphic below shows how this works. Not only is there an immediate charitable income tax deduction but it is possible to bypass a portion of the capital gains tax on the sale of an appreciated asset.

In addition, the gift annuity may significantly increase income. Many donors appreciate the fixed payments. And the benefits don't end there. Of the annual income payment, a portion of the payment may be tax free.



HOW CAN WE HELP?

- ☐ Please contact me with more information about planned gifts and estate planning strategies.
- ☐ I have already included your organization in my will or trust.
- ☐ Please send me your FREE estate planning guide.

The best way to contact me is by:

☐ Email ☐ Mail ☐ Telephone

Name _____

Street _____

City _____

State/Zip _____

Phone _____

Email _____

Asset Value _____

Cost Basis _____

First Person DOB _____

Second Person DOB _____

First Payment Date _____

(All inquiries are treated with complete confidentiality.)

This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.

The names and images shown here are representative of typical donors and may or may not be actual donors to the organization. Under federal rules your benefits may be different from this example. Please contact us for your specific benefits.