



# CATHOLIC GIFT ANNUITY®

Administered by Catholic Extension

This brochure provides basic information on a charitable gift annuity, which is an irrevocable agreement. Advice from a financial advisor may be beneficial when considering this gift.

The Catholic Gift Annuity program follows the suggested payout rates by the American Council on Gift Annuities. Rates and more information can be found at [www.catholicgiftannuity.org](http://www.catholicgiftannuity.org).

Catholic Gift Annuity is administered by Catholic Extension, which has been providing charitable gift annuities since 1912. Catholic Extension provides this service to support people, infrastructure and ministries of your diocese and others across the United States. To maintain financial strength of this program's reserves, Catholic Extension may retain up to 10% of the amount to be distributed to Catholic organization(s). For more information visit: [www.catholicextension.org](http://www.catholicextension.org).



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*A charitable gift annuity to benefit the Catholic organization(s) of your choice is a generous expression of your support for the Catholic Church. The Catholic Gift Annuity program, provided in partnership with your bishop, is an effective way to make sure your legacy lives on.*

## Create a Legacy

WITH A CHARITABLE GIFT ANNUITY



## WHAT IS A CHARITABLE GIFT ANNUITY?

A charitable gift annuity is a simple contract. You make a gift to Catholic Gift Annuity, and in return, you receive fixed payments for life. At your death, the remaining balance of the gift annuity is distributed to the Catholic organization(s) you designated.



## WHAT ARE THE BENEFITS?

- Receive fixed payments for life; a portion of these payments are tax free.
- Receive an income tax deduction for a portion of your gift, as allowable by IRS rules.
- Join a pool of thousands of Catholics in a financially strong program that helps the Catholic Church.
- Feel satisfied in making a significant gift that benefits you now and the Catholic organization(s) of your choice for future generations.

## WHAT ARE THE FEATURES?

- Secure, convenient deposit of payments into your preferred bank account.
- Three types of annuities to select from (rates vary):
  - Immediate One Life
  - Immediate Two Lives—Two recipients
  - Deferred—Start payments later
- The Catholic Gift Annuity program combines your gift with others from across the U.S. to increase the impact of your generosity.
- The minimum amount to establish a gift annuity is \$5,000; the minimum age to receive income is 55 years old.

## Create your legacy today!

**Yes! Please send me gift annuity information, including income and tax benefits.**

1 I am considering a gift of:

\$ \_\_\_\_\_

2 In the form of:

Cash    Appreciated Stock

3 Please provide the following information:

NAME \_\_\_\_\_ AGE \_\_\_\_\_

NAME (FOR TWO LIVES ANNUITY) \_\_\_\_\_ AGE \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_

STATE \_\_\_\_\_ ZIP \_\_\_\_\_

TELEPHONE \_\_\_\_\_

EMAIL \_\_\_\_\_

4 Submit request to:

Keith J. Tharp, CFRM  
Director  
Catholic Foundation of  
Southwestern Michigan  
215 N Westnedge Avenue  
Kalamazoo, MI 49007-3760  
Main: 269-349-8714 ext 1351  
Email: ktharp@diokzoo.org

Or mail to:

CATHOLIC GIFT ANNUITY  
150 S. Wacker Dr., Suite 2000  
Chicago, IL 60606