

**IN THE ACT OF GIVING, WE
RECEIVE MORE THAN WE
THOUGHT IMAGINABLE.**

You can view this from a child's perspective or appreciate the gratitude of someone whose life has been transformed by your contribution. A charitable donation can provide numerous advantages to your parish or parish school.

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.



FOR MORE INFORMATION

- ☐ I would like to speak with someone who can provide additional information on endowment gifts.
- ☐ I would like to receive information on other charitable tax planning options.

THE BEST WAY TO CONTACT ME IS BY:

☐ Email ☐ Mail ☐ Telephone

Name: _____
Street: _____
City: _____
State/ZIP: _____
Phone: _____
Email: _____
School: _____

Please complete and return to the address listed below. All inquiries are treated with complete confidentiality.

Mrs. Meghann Bauer
mbauer@notredamevacaville.org
707 447 1460

**ANNUITY PAYMENTS NOW
& YOUR LEGACY LATER: WITH A
CHARITABLE GIFT ANNUITY**



THE CHARITABLE GIFT ANNUITY



CREATE A LEGACY GIFT FOR YOUR SCHOOL

Your contribution now ensures you receive lifelong payments, along with the assurance that your donation will support the charity in the future.

The exact rate is determined by the donor's age.

See sample charitable gift annuity rates to the right.

GIFT ANNUITY FROM STOCK

A gift annuity can be funded through various methods, including cash, but using a block of appreciated stock can be particularly advantageous. This approach not only provides an immediate charitable income tax deduction, but it also allows for the potential to avoid some capital gains tax when selling an appreciated asset.

Additionally, part of the payment may be tax-exempt.

The graphic below illustrates the key benefits of a gift annuity.

SAMPLE RATES			
One Life		Two Lives	
Age	Rate	Age	Rate
65	4.7%	65/65	4.2%
75	5.8%	70/75	4.8%
85	7.8%	80/85	6.1%
90+	9.0%	90/95	8.8%

FOR A PERSONALIZED PROPOSAL

Please send me a personalized gift annuity proposal based on the following:

Name: _____

Street: _____

City: _____

State/ZIP: _____

Phone: _____

Email: _____

Amount: _____

Age- First Person: _____

Age- Second Person: _____

Please complete and return to the address on the back panel. All inquiries are treated with complete confidentiality.