



CHARITABLE GIFT ANNUITY



A Gift for Life

A Charitable Gift Annuity is a contract with the Catholic Community Foundation that provides you with fixed income payments for life, no matter how long you live. Payment rates are based on age and are set by the American Council of Gift Annuities. At the end of your life, any remainder of the annuity will benefit the specific organization you designate. You also have the ability to choose a Deferred Charitable Gift Annuity, meaning that you start receiving income payments at a later date.



Consider a Charitable Gift Annuity if you...

- Want to receive fixed payments that are unaffected by interest rates or stock market fluctuations
- Feel called to donate to a charity, but need to ensure income through retirement
- Want to diversify your retirement income
- Want to make a gift now, but don't need the income until a later date (deferred option)



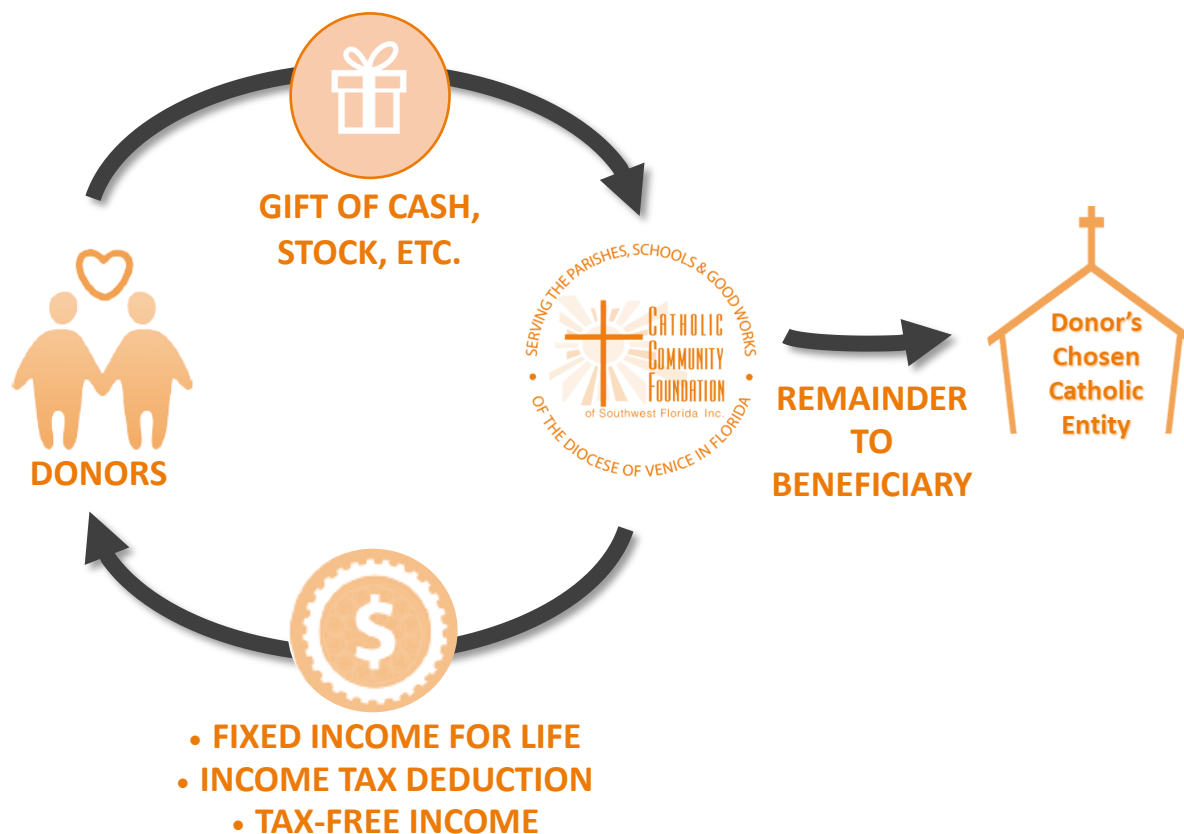
Key benefits

- Fixed income for life, for you and/or your spouse—paid quarterly or annually
- Avoid capital gains tax when you donate highly appreciated assets
- Income tax deduction in the year the gift annuity is established
- A portion of your income payments from the gift annuity is tax-free income
- Typically you will receive significantly higher payment rates than a standard certificate of deposit (CD)



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How does a Charitable Gift Annuity work?



Sample Annuity Rates*

Age	Rate
85	8.7%
80	7.6%
75	6.6%
70	5.9%
65	5.4%

*As of 9/15/23

Fast facts



- Minimum amount is \$10,000
- Minimum age to start receiving payments is 65 years old
- Rates are dependent upon age
- Single or two-life options



Scan the QR Code to learn more.

Let's talk

About the Catholic Community Foundation

The Catholic Community Foundation of Southwest Florida began operating in 2004 to help donors create lasting legacies uniquely aligned with their Catholic values and beliefs. The Foundation works with donors to provide long-term support and sustainability to the ministries, programs, and entities about which they care most.

Why the Catholic Community Foundation

The Foundation supports the mission of Christ in the Diocese of Venice and beyond and was created as an independent 501(c)(3) not-for-profit to help safeguard donors' assets and to ensure that donations will always be used in alignment with donors' wishes. The Foundation also invests all donations in Catholic-screened investments in keeping with our Faith.

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