



**CATHOLIC
GIFT
ANNUITY®**

Administered by Catholic Extension



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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.

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.



*Create
a Legacy*

WITH A CHARITABLE
GIFT ANNUITY



*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.*

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:

Or mail to:

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