



Building Faith | Inspiring Hope | Igniting Change



# CATHOLIC GIFT ANNUITY

Promotional resources and examples

BUILDING FAITH  
INSPIRING HOPE  
IGNITING CHANGE

150 South Wacker, Suite 2000  
Chicago, IL 60606  
[www.catholicextension.org](http://www.catholicextension.org)

- Parish Bulletin Announcements
- Weekly Email announcements to Pastors, priests and clergy

**Suggested Bulletin and newspaper advertisement:**

A charitable gift annuity to benefit \_\_\_\_\_ is a generous expression of your support for God's work on this earth. Catholic Gift Annuities are now available through a program offered by the Catholic Church Extension Society, one of the largest, oldest and strongest managers of annuities in the U.S. By taking out a Catholic Gift Annuity you may be eligible for a charitable tax deduction, receive fixed payments for life and leave a legacy to \_\_\_\_\_. To learn how you can join thousands of Catholics who invest in the future of the Catholic Church, please visit [www.catholicgiftannuity.org](http://www.catholicgiftannuity.org) or call 1-800-842-7804 and tell them you want to establish an annuity to help \_\_\_\_\_.

**Suggested Pastors/Priest/Clergy announcement:**

Charitable gift annuities are now available to you and your parishioners through a program offered by the Catholic Church Extension Society. The Catholic Gift Annuity program, brought to the diocese at the direction of Bishop \_\_\_\_\_, is an effective way to encourage your parishioners to leave a legacy gift to benefit your parish and/or school. To learn more about this program please visit [www.catholicgiftannuity.org](http://www.catholicgiftannuity.org) or call Bobbi Hannigan at 1-800-842-7804.

## Diocese of Alexandria

## Church Today November 2013 Issue

### Catholic Extension offers gift annuities that benefit church parishes

A charitable gift annuity to benefit your parish or the Diocese of Alexandria is a generous expression of your support for God's work on this earth.

Catholic Gift Annuities are now available through a program offered by the Catholic Church Extension Society, one of the largest, oldest and strongest managers of annuities in the U.S.

By taking out a Catholic Gift Annuity you may be eligible for a charitable tax deduction, receive fixed payments for life and leave a legacy to your parish or diocese.



#### 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 to make a significant gift that benefits you now and the Catholic organization(s) of our 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.

To learn how you can join thousands of Catholics who invest in the future of the Catholic Church, please visit [www.catholicgiftannuity.org](http://www.catholicgiftannuity.org) or call 1-800-842-7804 and tell them you want to establish an annuity to benefit your church parish or the diocese.

# INTRODUCING PROGRAM

Diocese of Dodge City  
Southwest Register  
January 2014 issue

Page 8 January 26, 2014

The Southwest Kansas Register

## Diocese of Dodge City launches program to lend financial support to parishes *Catholic Extension offers gift annuities that benefit church parishes*

Stewardship is the grateful response of a Christian disciple who recognizes and receives God's gifts and shares these gifts in love of God and neighbor. We as Christian disciples realize that all our gifts including time, talent and treasure are gifts given to us through the grace of God and we are called by our Lord to share these gifts through the four pillars of faith: that being through Hospitality, Service, Prayer and Formation.

A hospitable steward is compelled to share his or her treasure and one way to generously express your support for God's work on this earth is through a charitable gift annuity to benefit your parish, school, or the Diocese of Dodge City.

Mark Roth, who recently assumed the role of Development Director for the diocese, will work closely with Catholic Gift Annuities to offer annuities that will benefit the Catholic organization of your choosing. Catholic Gift Annuities are now available through a program offered by the Catholic Church Extension Society, one of the largest, oldest and strongest managers of annuities in the U.S.

By taking out a Catholic Gift Annuity you may be eligible for a charitable tax deduction, receive fixed payments for life and leave a legacy to your parish, school, Catholic ministry, or diocese.

**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 being 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 to make 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, and 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 75 years old.
- Catholic Church Extension Society has been a partner in ministry with mission dioceses including the Catholic Diocese of Dodge City for several decades and continues to provide grant funding for many diocesan and parish ministries each year.

**CATHOLIC  
GIFT  
ANNUITY™**  
Administered by Catholic Extension

To learn more about how you can join thousands of Catholic who invest in the future of the Catholic Church, please visit [www.catholicgiftannuity.org](http://www.catholicgiftannuity.org) or contact Mr. Mark Roth, Director of Development at [mrroth@diocese.org](mailto:mrroth@diocese.org) or by phone at 620-227-1535.



### Frequently Asked Questions

- Will my annuity rate change over time?**  
Your annuity rate will not change regardless of economic conditions or market fluctuations. It will remain fixed through your lifetime.
- Can I have multiple annuity contracts?**  
Yes! Many of our current annuitants have multiple contracts with us, some with staggered payment dates. Many annuitants incorporate gift annuities as part of their retirement and estate plans.
- Will I have access to the principal of my annuity?**  
A charitable gift annuity is an irrevocable agreement. Because a charitable deduction is received at purchase, there is no access to the principal.
- How will I receive my payments?**  
Catholic Gift Annuity offers secure, convenient deposit of payments, directly into annuitant's bank account. All we need for you to receive payments is a voided check with the signed authorization form.

Please return this inquiry form to:  
Mark W. Roth, Development Director, Diocese of Dodge City, P.O. Box 137, Dodge City, KS 67801

Yes, I am interested in learning more about a Catholic Gift Annuity

Name \_\_\_\_\_

Address \_\_\_\_\_ City, State Zip \_\_\_\_\_

Parish \_\_\_\_\_

Telephone \_\_\_\_\_ Email \_\_\_\_\_

# INTRODUCING PROGRAM

## Host Estate Planning Seminars

- Clergy – End of Life Concerns
- Attorneys/Financial Planners
- Funeral Homes

