



Building Faith | Inspiring Hope | Igniting Change



CATHOLIC
GIFT
ANNUITY®

Administered by Catholic Extension

CATHOLIC GIFT ANNUITY

Instructions on customizing marketing material

BUILDING FAITH
INSPIRING HOPE
IGNITING CHANGE

150 South Wacker, Suite 2000
Chicago, IL 60606
www.catholicextension.org

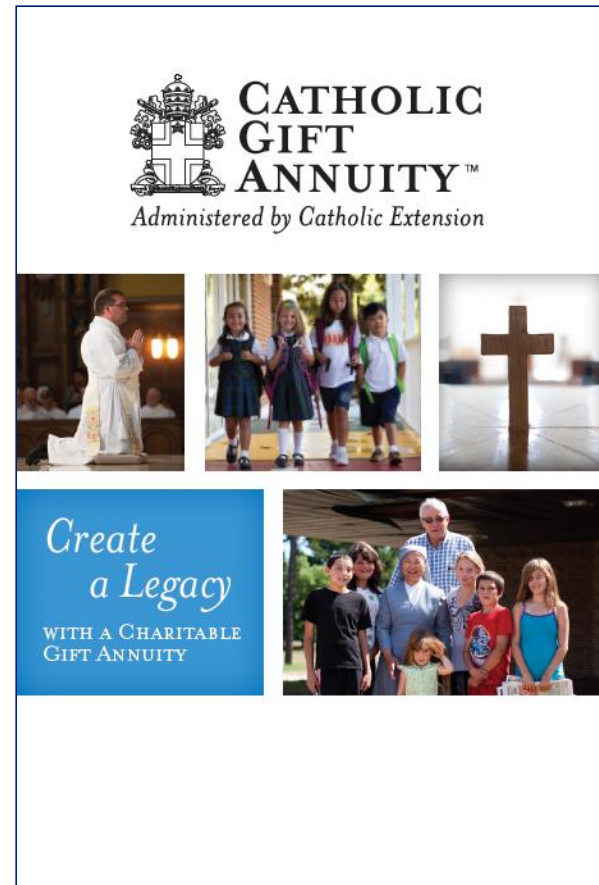
PROCESS OF PERSONALIZE MATERIALS

1. Review the examples on the following pages
2. Identify diocesan information to incorporate
 1. Logo or Crest (hi-resolution)
 2. Contact Information
 3. Pictures (hi-resolution)
3. Click **Catholic Gift Annuity HR Material** to access
 1. Tri-Fold Brochure
 2. Application Booklet
4. Customize material using graphic design software¹
5. Determine Quantity²
6. Email files to **triordan@catholicextension.org**

Tri-Fold Brochure



Application Booklet



PERSONALIZED MATERIALS-EXAMPLE 1



Create
a Legacy
WITH A CHARITABLE
GIFT ANNUITY



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:

Mary Lavin, Director of Major Gifts
Archdiocese for the Military Services, USA
1025 Michigan Avenue, NE
Washington, D.C. 20017
mlavin@milarch.org

Or mail to:

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



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



www.milarch.org

(202)-719-3622
CGAIT

CUSTOMIZED MATERIALS-EXAMPLE 2



Create
a Legacy

WITH A CHARITABLE
GIFT ANNUITY



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 _____

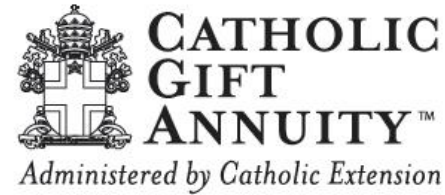
4 Submit request to:



1501 S. Federal Way, Suite 400
Boise, ID 83705
(208) 342-1311
www.CatholicIdaho.org

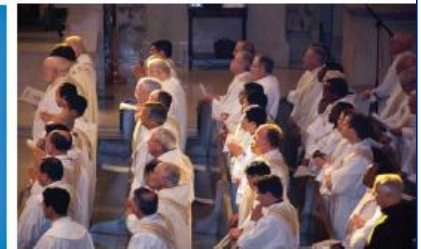
Or mail to:

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



Create
a Legacy

WITH A CHARITABLE
GIFT ANNUITY



CUSTOMIZED MATERIALS-EXAMPLE 3



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




*Create
a Legacy*


WITH A CHARITABLE
GIFT ANNUITY







**Catholic Diocese
of
Dodge City**



*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 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:
Mark W. Roth,
Development Director
Catholic Diocese of Dodge City
9100 Central Ave.
Dodge City, KS 67801
mroth@dcdiocese.org
Or mail to:

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

CUSTOMIZED MATERIALS-EXAMPLE 4

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



Create
a Legacy
WITH A CHARITABLE
GIFT ANNUITY



 supporting the
DIocese of TYLER

Create your legacy today!

1 Yes! Please start my application.
 Enclosed is my check payable to Catholic Gift Annuity for \$ _____ to establish a charitable gift annuity with Catholic Gift Annuity.

I am considering donating appreciated stock. Please contact me.

MINIMUM AGE: 55 / MINIMUM AMOUNT: \$5,000

2 Please select the following:
 Type of Annuity: Individual Two Lives
 Deferred-Start my payments at age ____
 Payments: Annually Semi-Annually Quarterly

3 Please complete:
 NAME _____
 ADDRESS _____
 CITY _____ STATE _____ ZIP _____
 BIRTHDATE / / SOCIAL SECURITY NUMBER _____
 TELEPHONE _____ EMAIL _____

NAME (FOR TWO LIFE ANNUITY) _____
 BIRTHDATE / / SOCIAL SECURITY NUMBER _____

Relationship: Spouse Sibling Friend

4 Please indicate distribution of remaining amount:
 REMAINDER ORGANIZATION Please keep my gift anonymous

_____% Diocese of Tyler
 _____% _____
 10% Catholic Gift Annuity Reserve
 100% (Must equal 100%)

5 SIGNATURE _____ DATE _____
 Upon acceptance an irrevocable agreement will be issued for signature by both parties.
 (OVER)

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Administered by Catholic Extension

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 Contact Peter Kane
 Stewardship & Development Office
giving@dioceseoftyler.org
 903 534 1077 EXT. 160

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 \$10,000; the minimum age to receive income is 65 years old.



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Catholic Community Foundation of Middle Tennessee
Ron Szejner, Executive Director
2400 21st Avenue, South, Nashville, TN 37212-5387
P: 615-783-0278 • F: 615-783-0774
www.ccfmtn.org

CCAF

¹Files format options

1. Save as “.pdf” file using Adobe or other design software
2. Save as “.idml” file using In-Design software, file format is available upon request

²Catholic Extension will provide up to 500 of each at no cost

1. Tri-Fold Brochure
 2. Application Booklet
- Any questions feel free to email Tom Riordan
triordan@catholicextension.org or call 831-645-2827.