



Building Faith | Inspiring Hope | Igniting Change

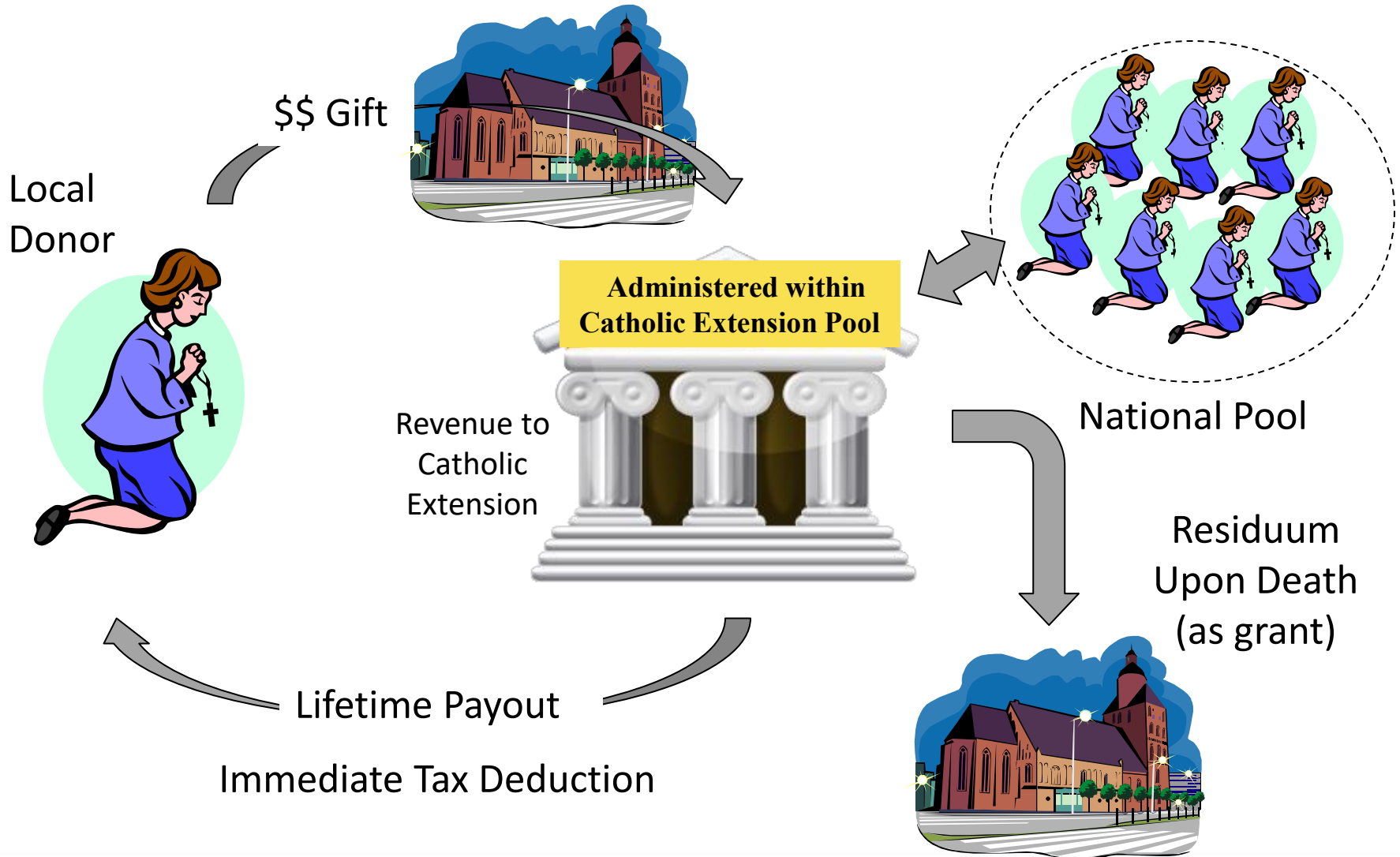


# INTRODUCING CATHOLIC GIFT ANNUITY PROGRAM

BUILDING FAITH  
INSPIRING HOPE  
IGNITING CHANGE

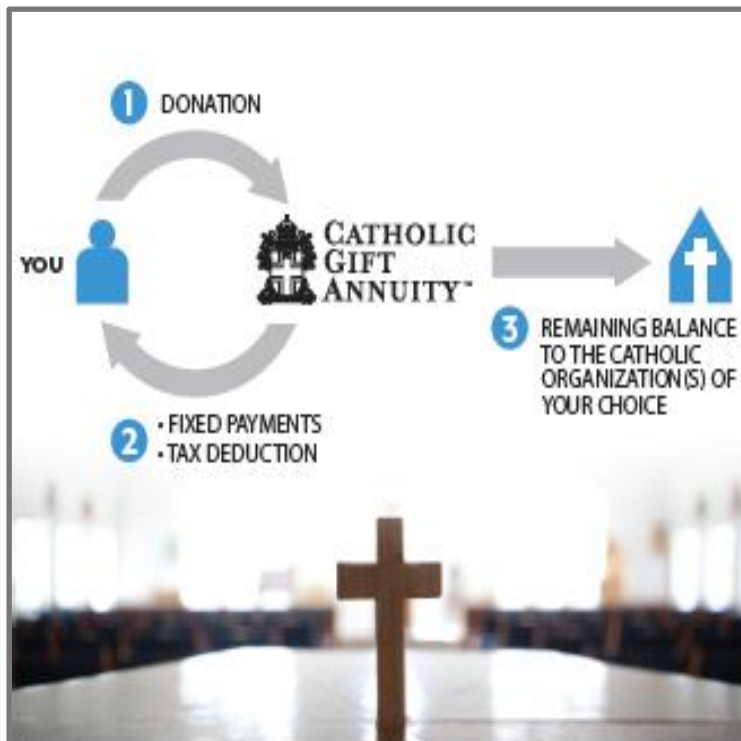
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Chicago, IL 60606  
[www.catholicextension.org](http://www.catholicextension.org)

# CATHOLIC GIFT ANNUITY PROGRAM



- No risk, cost or administration.
- Marketing materials provided.
- 90% of residuum provided to diocese upon termination of irrevocable contract.
- Additional tool for developing legacy gifts.

# WHAT IS A CATHOLIC GIFT ANNUITY?



- It is a simple contract. You, the donor make a donation to Catholic Gift Annuity and in return, you receive fixed payments for life.
- The remaining balance of the gift benefits the Catholic organization(s) you designate within the Diocese.


## PROGRAM BASICS

- Amount: Minimum \$5,000                      Maximum: None
- Gift Type: Cash or appreciated stock
- Minimum Age: Payments begin at 55
- Rates: Follow ACGA effective July 2020
- Types:
  - Immediate One Life
  - Immediate Two Lives – Two recipients
  - Deferred-Payments start after one year

## WHAT ARE THE BENEFITS TO THE DONOR?

- Fixed payments for life; a portion of these payments are tax free.
- Immediate income tax deduction for a portion of your gift, as allowable by IRS rules.
- Satisfaction knowing your gift today will be used to support future Catholics in your Diocese.
- Join a pooled group of other Catholics from across the U.S. to increase the impact of your generosity.

# LEGACY OF CATHOLIC EXTENSION CHARITABLE GIFT ANNUITY PROGRAM




**A CATHOLIC EXTENSION CHARITABLE GIFT ANNUITY HELPS BUILD FAITH ACROSS AMERICA**

Every day in parishes across the country, Catholics struggle to celebrate the fullness of their faith. They live in poor mission dioceses, where the faith is alive and growing but the resources to support the Church are scarce.


By establishing a charitable gift annuity through Catholic Extension, you help these communities build churches, strengthen ministries, and support their lay and ordained leaders. *When considering additional ways to increase your income, please remember that establishing another Catholic Extension annuity is a generous expression of your commitment to the vibrant life of the Church in the United States.*

Please continue to help us meet the needs of poor Catholic communities and establish an additional gift annuity today.

*F. Jack Wall*  
Father Jack Wall  
President  
Catholic Extension



Diocese of Kalamazoo, Michigan



- Donor can be confident in Catholic Extension's History
- Issuing gift annuities for over 100 years
- Currently administers over 3,000 contracts
- Never missed a payment!

### Join


- Review \*General Fundraising Actions & Procedures
- Complete of \*Memorandum of Understanding

### Create Awareness

- Place an \*advertisement in your Church bulletin
- Provide the \*tri-fold brochures and \*application booklets in the back of the church

\* See Appendices





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

HOME


ABOUT

ANNUITY RATES


APPLY NOW

FUNDRAISERS

CONTACT




**The Catholic Gift Annuity program, provided in partnership with your bishop, is an effective way to make sure your legacy lives on.**




**About**

Learn about the benefits of establishing a Catholic Gift Annuity to benefit the Catholic organization of your choice.




**Annuity Rates**

View the current Catholic Gift Annuity rates, established by the American Council on Gift Annuities.



**Apply Now**

Establish a legacy of support for the Catholic Church.



**For Fundraisers**

Diocesan representatives: access Catholic Gift Annuity actions and procedures, and download support resources.

## Tri-Fold Brochure

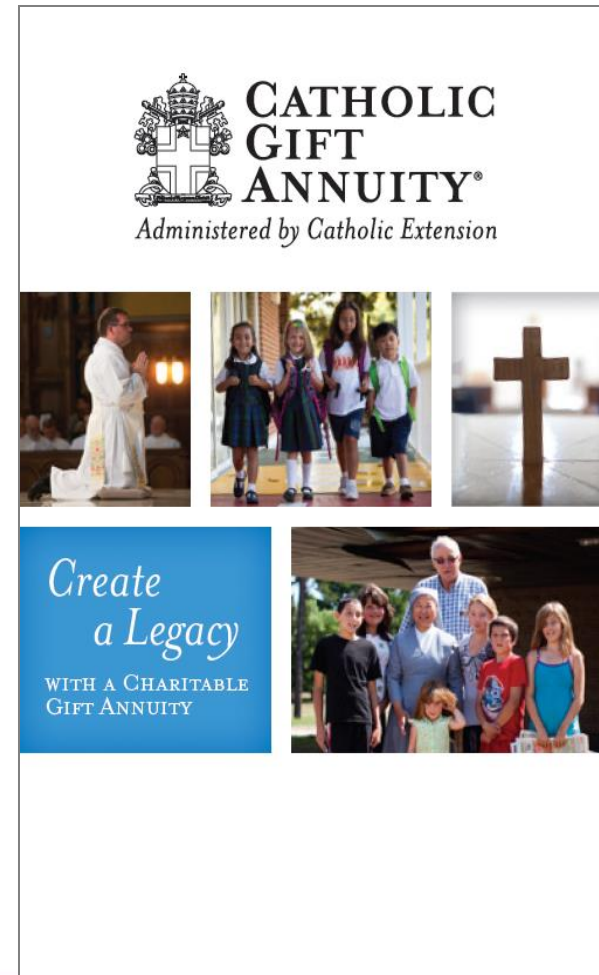


The tri-fold brochure layout features the Catholic Gift Annuity logo at the top left. Below the logo are two images: a priest in white vestments and a group of children in school uniforms. The middle section contains a blue box with the text "Create a Legacy WITH A CHARITABLE GIFT ANNUITY" and a wooden cross image. The bottom section shows a family photo.

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

*Create  
a Legacy*  
WITH A CHARITABLE  
GIFT ANNUITY

## Application Booklet



The application booklet layout features the Catholic Gift Annuity logo at the top. Below the logo are three images: a priest, children, and a wooden cross. The middle section contains a blue box with the text "Create a Legacy WITH A CHARITABLE GIFT ANNUITY" and a family photo.

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# Thank you!