

CHARITABLE GIFT ANNUITY

INVEST IN BETTER TOMORROWS

Making a gift through a Charitable Gift Annuity (CGA) offers a unique opportunity to accomplish your philanthropic support of Orlando Health while also increasing your income and producing several personal tax benefits. Your gift will help to bring care and compassion to patients in Central Florida beyond your lifetime.

With just a simple agreement between you and the Orlando Health Foundation, a gift annuity can be established with an irrevocable donation as low as \$10,000 and can be funded with cash or appreciated assets such as stocks, bonds or mutual funds.

IS IT RIGHT FOR ME?

A CGA may be a good fit if you want to:

- Make an impact while also benefitting from your gift
- Have the security of lifetime fixed income to use for retirement etc.
- Choose when you'd like to increase your cash flow with payments now, or in the future
- Receive an immediate charitable deduction
- Sell appreciated stock and lessen your capital gains tax

HOW ARE RATES DETERMINED?

The annual rate of your payment is based on your age at the time of the gift. The older you are, the higher the rate of the annuity. Those under age 65 might consider a deferred gift annuity which provides an immediate income tax deduction, but you set a future date for the annuity payments to begin. This provides a tax benefit now, and a higher payment later.

CONTACT US TO SEE WHAT YOUR RATE OF INCOME MAY LOOK LIKE:

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