

# CHARITABLE GIFT ANNUITY

## INVEST IN BETTER TOMORROWS

### WHAT IS A CGA?

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.

A CGA may be an option, if you want to:

- Increase your cash flow with fixed payments now or in the future
- Sell appreciated stock and lessen your capital gains tax
- Receive an immediate charitable deduction

### IS IT RIGHT FOR ME?

AGE	RATE *	ANNUAL INCOME**	CHARITABLE DEDUCTION**
70	5.1%	\$510	\$4,050
75	5.8%	\$580	\$4,548
80	6.9%	\$690	\$4,933
85	8.0%	\$800	\$5,546

\*Rates recommended by the American Council on Gift Annuities.

\*\*Sample income and charitable deduction based on a \$10,000 annuity

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.

### FOR MORE INFORMATION PLEASE CONTACT:

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