

## Invest in Better Tomorrows

### What is a Charitable Gift Annuity?

Making a gift through a Charitable Gift Annuity (CGA) offers a unique opportunity to philanthropically support Orlando Health while also increasing your income and producing several personal tax benefits.

A CGA can be established with a donation as low as \$10,000 and can be funded with cash or appreciated assets such as stocks, bonds or mutual funds. In return, you will receive a set income for life, after which time the remainder of the fund will be donated to Orlando Health.



### 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. Annuities may also be deferred to begin payments on a future date, providing an immediate income tax deduction and a higher payment later.

Contact us to see what your rate of income may look like:

#### Matt Lilly

Sr Vice President, Planned Giving  
Email: [Matt.Lilly@OrlandoHealth.com](mailto:Matt.Lilly@OrlandoHealth.com)  
Phone: (321) 843-2488

#### Tiffany Collier

Sr Director, Planned & Major Gifts  
Email: [Tiffany.Collier@OrlandoHealth.com](mailto:Tiffany.Collier@OrlandoHealth.com)  
Phone: (321) 841-7010