

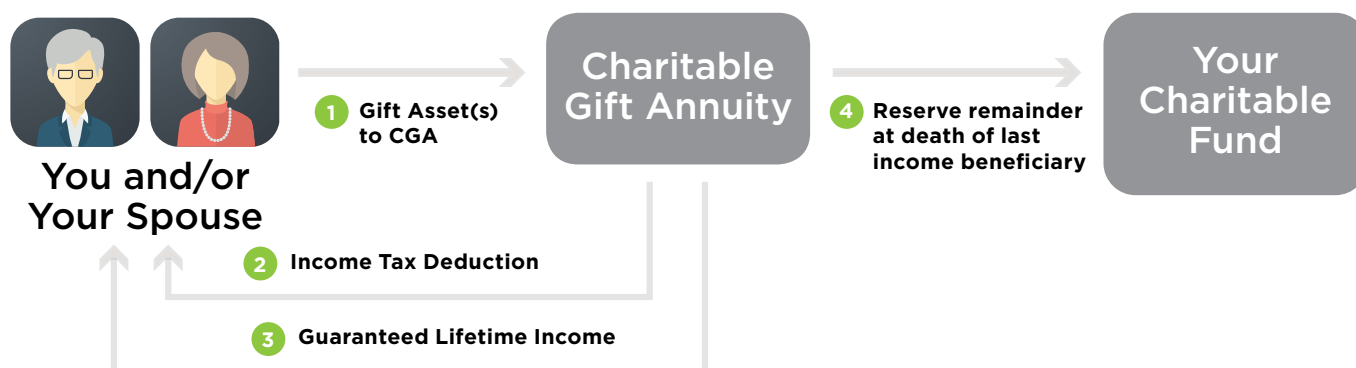
Sustain Your Favorite Causes & Receive Fixed Payments For Life

Charitable Gift Annuity

A Charitable Gift Annuity is a time-tested method that many of our donors use to both give and receive. In addition to generating an immediate income tax deduction, this “planned gift” pays you fixed income for life. After your lifetime, the remainder in the account will be transferred into your charitable fund and will be distributed to nonprofit organizations or causes, according to your wishes.

A Charitable Gift Annuity can be an attractive part of your overall retirement income and may add significantly to your charitable legacy. The fixed income payment amounts are based upon your (and/or your spouse’s) age at the time of the gift, and you can choose whether you receive payments immediately, or defer them to a later date.

How It Works:



The minimum amount to open a Charitable Gift Annuity is \$25,000, either in cash or appreciated securities. The benefits of establishing a gift annuity include:

- An immediate (partial) income tax deduction;
- Fixed lifetime income (partially tax-free!);
- A reduction of your taxable estate;
- Avoidance of capital gains on the sale of gifted assets; and
- Satisfaction from enhancing your charitable legacy.

Charitable Gift Annuity rates are attractive, offering a reliable flow of income and a future gift to your charitable fund to support the causes you love.

Single Life

Age	Payout Rate
65	5.7%
70	6.3%
75	7.0%
80	8.1%
85	9.1%
90+	10.1%

Two Lives (Joint & Survivor)

Age	Payout Rate
65/65	5.0%
70/70	5.5%
75/75	6.2%
80/80	6.9%
85/85	8.1%
90/90	9.8%



**SACRAMENTO REGION
COMMUNITY
FOUNDATION**
INSPIRING PHILANTHROPY

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Rates effective 1/1/2025

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Charitable Gift Annuity

For an illustration of how a Charitable Gift Annuity can help you reach your financial and charitable goals, please email the following information to legacy@sacregcf.org and our team will be in touch.

Annuitant #1: _____
Name Date of Birth

Annuitant #2: _____
Name Date of Birth

Relationship: ☐ Spouse ☐ Other: _____

Source of Gift: ☐ Cash Amount: \$ _____
☐ Stock _____ shares of _____
Fair market value \$ _____ Cost basis \$ _____
☐ IRA Qualified Charitable Distribution Amount: \$ _____



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