

Income Gifts

Charitable Remainder Trusts | Charitable Gift Annuity

Charitable Gift Annuity

A Charitable Gift Annuity is a simple giving arrangement that allows a donor to support the causes they care about while receiving fixed payments for life. This can be a meaningful option for donors who want to make a future charitable impact while creating a predictable income stream during their lifetime.

Potential Benefits of a Charitable Gift Annuity:

- Bypass capital gains tax when funding the gift with appreciated assets
- Create a fixed income stream for yourself or for yourself and a loved one
- Simplify your estate
- Receive a charitable tax deduction now
- Create a permanent charitable legacy

Charitable Gift Annuities at a Glance

Feature	Charitable Gift Annuity
Income Type	Fixed payments for life
Asset Types to Establish	Cash, publicly traded securities, Qualified Charitable Distribution from IRA
Maximum Income Beneficiaries	Two
Complexity	Simple agreement
Minimum Gift	\$50,000
Charitable Income Tax Deduction	Yes
Estate Benefit	Yes