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The Charitable Gift Annuity

In Giving, You Receive

The charitable gift annuity (CGA) is a planning tool that recognizes the rewards of giving begin with the desire to make a gift.

To create a charitable gift annuity, a donor transfers an asset to the BSA. In turn, the BSA agrees to make payments to the donor(s) for life. The gift annuity adds a tangible benefit in the form of attractive payments. The specific rate is based on the age of the donor. See the table provided or contact us for your personal rate.

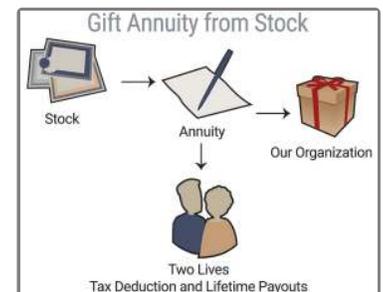
Age	Rate
60	4.7
65	5.1
68	5.3
70	5.6
72	5.8
74	6.1
76	6.4
78	6.8
80	7.3
82	7.7
84	8.1
86	8.5
88	8.9
90	9.5

Gift Annuity from Stock

While a gift annuity can be funded in a number of ways, let's examine the benefits of transferring an appreciated block of stock to charity.

The gift annuity graphic below shows the highlights. Not only is there an immediate charitable income tax deduction but it is possible to bypass a portion of the capital gains tax. For example, stock valued at \$200,000 with an original cost of \$40,000 transferred to a gift annuity may save more than \$24,000 in taxes!

Many donors appreciate the fixed payments of a gift annuity. A portion of the payment may be tax free. To find out your current rate, call or click today!



By Giving, We Receive.

Seeing firsthand how a gift changes lives and brings joy to others can change the lives of those that give.

A charitable gift can have many benefits beyond just helping charity. Strategies like the charitable gift annuity, provide many reasons to give.

This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.

