

The Jefferson Deferred Charitable Gift Annuity Program

A deferred charitable gift annuity (CGA) allows alumni and friends of Jefferson to make a gift and secure an attractive rate of income for the future.

Benefits include

- Select the length of deferment that best fits your needs – 5, 10, even 15 years. Minimum one-year deferral
- Fixed income for the lives of one or two beneficiaries
- A current income tax deduction
- Capital gains tax savings if appreciated property is used to fund the gift
- A portion of the annuity is income tax free
- Ability to designate the gift for a particular program or school at Jefferson
- Low minimum gift of \$10,000 per annuity

For a personalized deferred charitable gift annuity calculation or more information, either return the mailer below, call toll free **1-877-JEFF GIFT**, or visit the Gift Calculator at www.jefferson.planyourgift.org

One-Life Annuity

Age at gift date	Age at date of first payment	Annuity Rate	\$10,000 CGA		\$25,000 CGA	
			Deduction*	Annual Annuity	Deduction*	Annual Annuity
50	60	9.2%	\$4,735	\$920	\$11,836	\$2,300
55	65	9.7%	\$5,230	\$970	\$13,073	\$2,425
60	70	10.5%	\$5,750	\$1,050	\$14,377	\$2,625
65	75	11.4%	\$6,421	\$1,140	\$16,053	\$2,850

Two-Life Annuity

Age at gift date	Age at date of first payment	Annuity Rate	\$10,000 CGA		\$25,000 CGA	
			Deduction*	Annual Annuity	Deduction*	Annual Annuity
50/50	60/60	8.7%	\$3,851	\$870	\$9,628	\$2,175
55/55	65/65	9.0%	\$4,272	\$900	\$10,681	\$2,250
60/60	70/70	9.5%	\$4,757	\$950	\$11,894	\$2,375
65/65	75/75	10.1%	\$5,416	\$1,010	\$13,540	\$2,525

* Charitable deduction will vary slightly depending on the timing of the gift due to fluctuations in the Federal Discount Rate.

All donors are encouraged to consult their tax professional before entering into a gift annuity agreement.

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Individuals who decide to fund a deferred charitable gift annuity are welcomed into The Thomas Eakins Society, which recognizes those who have remembered Jefferson in their estate plans or through a life income gift.



Name _____ Class Year _____

Address _____

Phone _____

Birthdate of First Income Beneficiary ____ / ____ / ____

Birthdate of Second Income Beneficiary ____ / ____ / ____
(if applicable)