

# CHARITABLE GIFT ANNUITIES

A GUARANTEED RETURN



TULSA COMMUNITY  
FOUNDATION

Your Values. Your Legacy. Your Community.





## TULSA COMMUNITY FOUNDATION

Tulsa Community Foundation (TCF) was founded in late 1998 and exists to make charitable giving more meaningful and efficient. Hundreds of individuals and corporations make all their contributions to charities through TCF's services. TCF's donors and the charitable nature of Tulsans have made TCF the largest community foundation in America.

Donors give cash or appreciated assets to TCF and create individual funds in their names. Donors receive an immediate tax deduction and one receipt from TCF, then advise when those assets are given to charities they choose. TCF reviews each recommendation and approved grants are made to charities, in the name of the donor's fund, in Oklahoma, America and internationally. TCF handles all accounting, reporting, investing and grantmaking.

TCF helps educate donors on the community's highest needs, creates focused charitable giving strategies for donors, and works to involve children and other family members in multi-generational giving. TCF hosts programs that inform donors across the community about planned giving opportunities – using wealth, rather than current assets, to fund charitable activities. These programs allow donors to maximize what they leave to their families and to charity.

Please consider how you can use TCF's services to better accomplish your charitable objectives and make a more lasting impact on our community.

Everyone wants financial security. What if your investment could provide a guaranteed return and deliver peace of mind while benefiting a worthy cause? Through a charitable gift annuity, you can receive guaranteed income plus advance a charitable organization.

## WHAT IS A CHARITABLE GIFT ANNUITY?

A charitable gift annuity is an agreement between you and a charitable organization. You agree to make a gift of cash, stock, or other marketable property. In exchange, the charity agrees to pay you income payments for the rest of your life. At your death, the balance goes towards fulfilling the charity's mission.


## WHAT ARE THE TAX BENEFITS OF A CHARITABLE GIFT ANNUITY?

First, you will receive a charitable income tax deduction based upon your age and gift amount. Second, your annuity payments will be partially tax-free. Third, depending upon the type of property you contribute, you may be able to save your money from capital gains tax.

## CASE STUDIES\*

### Single-Life Gift Annuity

*Mrs. Jackson, age 68, would like to make a gift to charity and still receive income for life. She contributes \$10,000 to a qualified charity to establish a charitable gift annuity. In exchange, she receives \$630 per year (of which \$369 is tax-free) and a \$3,686 income tax deduction.*

A pair of hands, palms up, cupped together, holding a bright, glowing light. The hands are positioned centrally, with fingers slightly spread. The light emanates from the center of the palms, creating a soft, radiant glow. The background is a solid, warm orange color, which complements the skin tone of the hands and the intensity of the light. The overall composition is symmetrical and evokes a sense of care, protection, and hope.

YOUR PEACE  
OF MIND  
**YOUR WORTHY  
CAUSE**

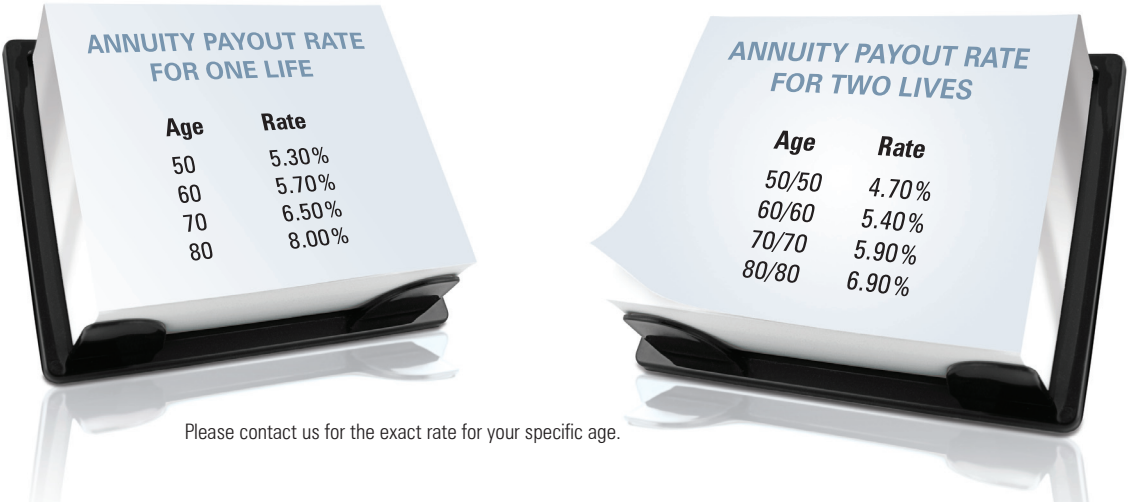
# Two-Life Gift Annuity

Mr. and Mrs. Howard, ages 68 and 65, would like to support their favorite charity with a \$15,000 charitable gift annuity. In exchange for their \$15,000 contribution, they receive \$855 per year for both of their lives and a \$3,956 income tax deduction. In addition, \$474 of their annual annuity income is tax-free.

\*Figures cited in examples are based upon current rates at the time of printing and are subject to change.

## HOW ARE CHARITABLE GIFT ANNUITY RATES ESTABLISHED?

The American Council on Gift Annuities establishes gift annuity rates by taking into account your age and the current investment climate. Below are tables illustrating rates for “one-life” and “two-life” gift annuities.





## TULSA COMMUNITY FOUNDATION

To learn more about how Tulsa Community Foundation can assist you to simplify, streamline and maximize your charitable giving, please contact:

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