

Charitable Gift Annuity Program

A WIN-WIN Gift

For various reasons, there may not be a better time to establish a charitable gift annuity with Southwest Community Health Foundation. Charitable gift annuities (CGA) have been around for decades and in many cases have been instrumental in building and growing programs and services at hundreds of charitable institutions nationwide. A CGA enables you to make a gift to your favorite charity and receive guaranteed, fixed income for the rest of your life. They are simple to establish and offer many benefits to you and Southwest General. Here is how a charitable gift annuity works:



Gifts of appreciated securities are an excellent way to spread out the capital gains tax and a portion of the gift will escape capital gains tax completely.

You will receive recognition in the Legacy category of the permanent Donor Recognition Exhibit, located in the Health Center's main corridor. The Legacy category was established to recognize donors who wish to extend their support beyond their lifetime. Your gift will ultimately support the health programs and services that are most important to you.

Cash and/or securities are donated by you to Southwest General – the minimum donation is \$10,000.

Minimum income payout age is 60 and a deferred annuity can be established for those 45 and older.

Payout rates are based on your age or the joint age for a two-life annuity.

Southwest General promises to pay you a fixed income for your life and your spouse or another if so desired.

There are no set-up fees.

Tax incentives include an attractive charitable income tax deduction in the year of your gift and tax-free income on a portion of your payments.

Interested persons are encouraged to compare charitable gift annuity rates with current rates on certificates of deposit or dividends and see how a charitable gift annuity may be a wise choice for you.

Sample current immediate payout charitable gift annuity rates:

Age	Income Rate	Age	Income Rate
60	5.0%	80	7.1%
65	5.3%	83	7.7%
70	5.7%	85	8.1%
75	6.3%	90	9.5%

Contact Maureen O’Neill-Laszlo, director of major and planned gifts at 440-816-6741 for rates not listed and to learn how you can establish a charitable gift annuity and begin reaping the benefits of this win-win gift arrangement now.