

Charitable Gift Annuity

Request a free personal illustration with no obligations

Would you like to make an investment in the future of the Friends House Retirement Community and especially the Resident Assistance Fund? ? Would you like to receive fixed guaranteed quarterly payments each year for life? **Would you like to count on fixed income payments which are unaffected by interest rates and stock prices and which you can't outlive?** Would you like to qualify for charitable income tax deductions

The charitable gift annuity (CGA) is among the oldest, simplest, and most popular method of making a deferred charitable gift. In exchange for a transfer of cash, stocks or bonds, Friends Fiduciary, a Quaker non-profit financial institution in Philadelphia, will contractually guarantee to pay a specified annuity to you and/or another annuitant, such as your spouse. By naming Friends House Retirement Community as the beneficiary of the charitable gift annuity, the remainder of the contract will come to Friends House to assure quality care for all future residents.

The minimum amount that is required to set up a charitable gift annuity is \$10,000. If you give appreciated stock, rather than cash, you can achieve additional capital gains savings.

To receive a free personal illustration with no obligations, we will need to know your (1) birth date, (2) the age that you wish to begin receiving payments, and (3) the amount you are considering giving. We can send you a computer developed personal illustration that will tell you the approximate amount of your charitable deduction, your guaranteed rate of return, expected quarterly payments, as well as your tax deductions for the years after the age you wish to begin receiving income. The individual computer projections take only minutes to develop, and the rates will be the same for any non-profit organization you choose. This is a free and confidential service and you are under no obligation to take out a charitable gift annuity with Friends House.

Thank you for considering the Friends House Retirement Community of Sandy Spring, Maryland for a charitable gift annuity.

Please send this form to Karen Lehman, Executive Director, Friends House Retirement Community, 17340 Quaker Lane, Sandy Spring, MD 20860 or email klehman@friendshouse.com

Name (first) _____ (last) _____

Date of Birth (month) _____ (day) _____ (year) _____

Spouse's Name (first) _____ (last) _____

Date of Birth (month) _____ (day) _____ (year) _____

Year you would like to begin receiving income:

(1) ____ immediately (2) deferred (year) _____

Amount you are considering giving (minimum \$5000) _____