



Gifts That Pay You Income

Did you know there is a gift you can make to Santa Barbara Foundation that returns payments to you? Yes, the IRS allows and encourages these creative plans that can substantially stretch your giving ability. Some of the best ways to support Santa Barbara Foundation are available through life-income gifts! The Legacy Charitable Gift Annuity plan has substantial advantages over other giving vehicles. This plan will produce a generous gift to Santa Barbara Foundation and you will receive income for life so you can provide for yourself and your family.



The Power of Legacy Charitable Gift Annuity Program

- An additional source of lifetime income for you and your family
- An immediate tax deduction for a portion of your gift
- No capital gains tax due at the transfer of appreciated assets to your gift plan

Call now toll-free
1-800-579-4707

Please see other side for more examples of life insurance premiums and resulting charitable gifts...

You can make a substantial donation
and provide for your family at the same time.

LEGACY CHARITABLE GIFT ANNUITY*

SAMPLES

Some sample rates as of July 1, 2014:

Your Ages	Two Beneficiaries		OR	One Beneficiary	
	Payout Rate	Deduction on \$100,000 Gift		Your Age	Payout Rate
67/65	4.3%	\$28,053	65	4.7%	\$34,898
70/68	4.5%	\$31,392	70	5.1%	\$40,991
75/70	4.8%	\$34,638	75	5.8%	\$45,772
80/75	4.3%	\$40,876	80	6.8%	\$50,205
80/80	5.7%	\$44,002	85	7.8%	\$56,599
85/80	6.1%	\$46,026	87	8.2%	\$59,436

*Deduction amounts are based on highest I.R.S. discount rate available for gifts made in July 2014.

Please note: The above discount rates change regularly. Please contact us for a current rates. We will e-mail; fax or mail current rates at your request. Please complete our online Proposal Request and we will get the information right to you.

Legacy Deferred Charitable Gift Annuity: For donors between the ages of 40 and 65 we have Legacy Deferred Charitable Gift Annuity.

- You transfer cash, securities or appreciated assets to your charity.
- Beginning on a specified date in the future, you, or up to two annuitants you name, will begin receiving fixed payments for life.
- Deferral of payments permits a higher annuity rate and generates a larger charitable deduction.
- You can target your annuity payments to begin when you need them, such as retirement.
- The longer you elect to defer payments, the higher your payment will be.

HOW IT WORKS

- You transfer cash, securities or appreciated assets to your charity
- Your charity purchases a Single Premium Annuity (SPIA)
- You and your spouse receive income for life
- For best results recommended for those 65 years old at time of gift
- For donors younger we have Legacy Deferred Charitable Gift Annuity* available
- Unlike traditional charitable gift annuities the Legacy Charitable Gift Annuity creates and immediate gift to your charity
- A portion of your annuity payment will be tax-free

Here's how to take a closer look:

1. Call toll-free to begin the courteous, no pressure process of exploring your Legacy Charitable Gift Annuity options.
2. Your agent will work with you to find the best annuity for your goals and obtain quotes for your review and consideration.
3. When you give us the okay, your agent will assist you through the process until your Legacy Charitable Gift Annuity is in place.

Call for more
information and your free,
no-pressure quote:

1-800-579-4707

8a.m. to 5p.m. Pacific Time
For current rates and lifetime
income amounts please call, mail
or e-mail.

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