



Is This Strategy Right for You?

If you would like to increase your retirement income and leave an impactful gift to the work of our organization, then the charitable gift annuity is a worthwhile option to consider.

May We Help You?

To learn more, please contact us. We would welcome the opportunity to answer further questions and work with you.

The names and images shown here are representative of typical donors and may or may not be actual donors to the organization. Under federal rules your benefits may be different from this example. Please contact us for your specific benefits.

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May We Help You?

- ☐ Please contact me with more information about planned gifts and estate planning strategies.
- ☐ I have already included your organization in my will or trust.
- ☐ Please send me your FREE estate planning guide.

The best way to contact me is by:

- ☐ Email
- ☐ Mail
- ☐ Telephone

Name

Street

City

State/Zip

Phone

Email

All inquiries are treated with complete confidentiality.

This information is not intended as tax, legal, or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.



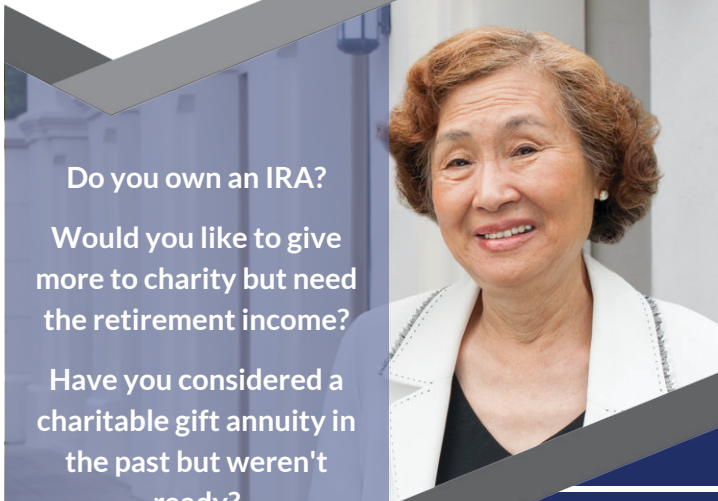
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MidwestMethodist.org | MethodistGift.org

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IRA ROLLOVER TO GIFT ANNUITY —

Helping You Increase Your
Income and Giving



Do you own an IRA?

Would you like to give
more to charity but need
the retirement income?

Have you considered a
charitable gift annuity in
the past but weren't
ready?

If you
answered "yes"
to these questions, the
Secure 2.0 Act provides a
once-in-a-lifetime easy way to do so
using a *tax-free distribution* from your IRA!



IRA ROLLOVER TO GIFT ANNUITY

CHARITABLE GIFT ANNUITY



Benefits of a Charitable Gift Annuity

- Lifetime income and financial security
- Attractive payment rates
- Opportunity to support our work

What Is a Charitable Gift Annuity?

A charitable gift annuity (CGA) is a contract between you and our organization – in exchange for your charitable gift, we agree to pay you a fixed income for your lifetime. Upon your passing, the annuity ceases and the remaining principal is used to further our mission.

How Does the Charitable Gift Annuity Work?

A charitable gift annuity (CGA) is a simple written agreement signed by you and our organization. Once you contribute cash from your IRA, the CGA begins to make monthly or quarterly payments to you for your lifetime. The payment rate is based on your age to your nearest birthday.

What the Secure 2.0 Act Provides

- Once-in-a-lifetime *tax-free distribution* from your IRA for a gift annuity
- Maximum allowable distribution amount of \$50,000 in 2023
- Lifetime income payments of 5% or greater
- Lowers your taxable estate

Other Considerations

- Charitable gift annuities may be set up to pay income to you or your spouse
- Under the act's provisions, you must be 70 1/2 or older to take advantage of this opportunity
- A charitable gift annuity is a general obligation of our organization and is backed by all of our assets