

Illustration of Ms. Pearce's Deferred Charitable Gift Annuity Funded with Cash

Summary of Estimated Benefits

5.7% Deferred Gift Annuity

ASSUMPTIONS:

Annuitant Age	55
Year of Gift	2020
Age at Date of First Payment (deferred for 10 years)	65
Cash Donated	\$50,000.00
Annuity Rate	5.7%
Payment Schedule	quarterly

ESTIMATED BENEFITS:

Charitable Deduction	\$13,708.50
Annuity	\$2,850.00
Tax-free Portion	\$1,900.95
Ordinary Income	\$949.05
Quarterly Payment	\$712.50
Total Before-Tax Benefit to Annuitant	\$54,435.00

After 19.1 years from the year payments begin, the entire annuity becomes ordinary income.

These calculations are for illustration purposes only and should not be considered legal, accounting, or other professional advice. Your actual benefits may vary depending on several factors, including the timing of your gift.