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# PERSONAL PLANNING NEWSLETTER

Spring 2022

## ROAD TRIP

PLAN FOR YOUR LIFE'S JOURNEY



[www.canvumfgiving.org](http://www.canvumfgiving.org)

1350 Halyard Dr., West Sacramento, CA 95691

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# THE ROAD CALLS YOU

YOU DECIDE YOUR  
TRIP BASED ON  
YOUR VALUES AND  
PRIORITIES



Our country is filled with many wonderful places worthy of a visit. If a road trip is not in your plans, maybe you can take a journey of a different kind.

While we may not be travel agents, we can help you plan out life's journey. Your life and your legacy are worth a little planning. We can help you enjoy the trip while reaching the destination you desire.

You may want to consider a charitable gift annuity. It offers you several great benefits.

When you fund one with us, you receive:

- Fixed payments for life at favorable rates
- An income tax deduction this year
- Capital gains benefits if you transfer stock
- Living every day knowing you will also join the mission of your church

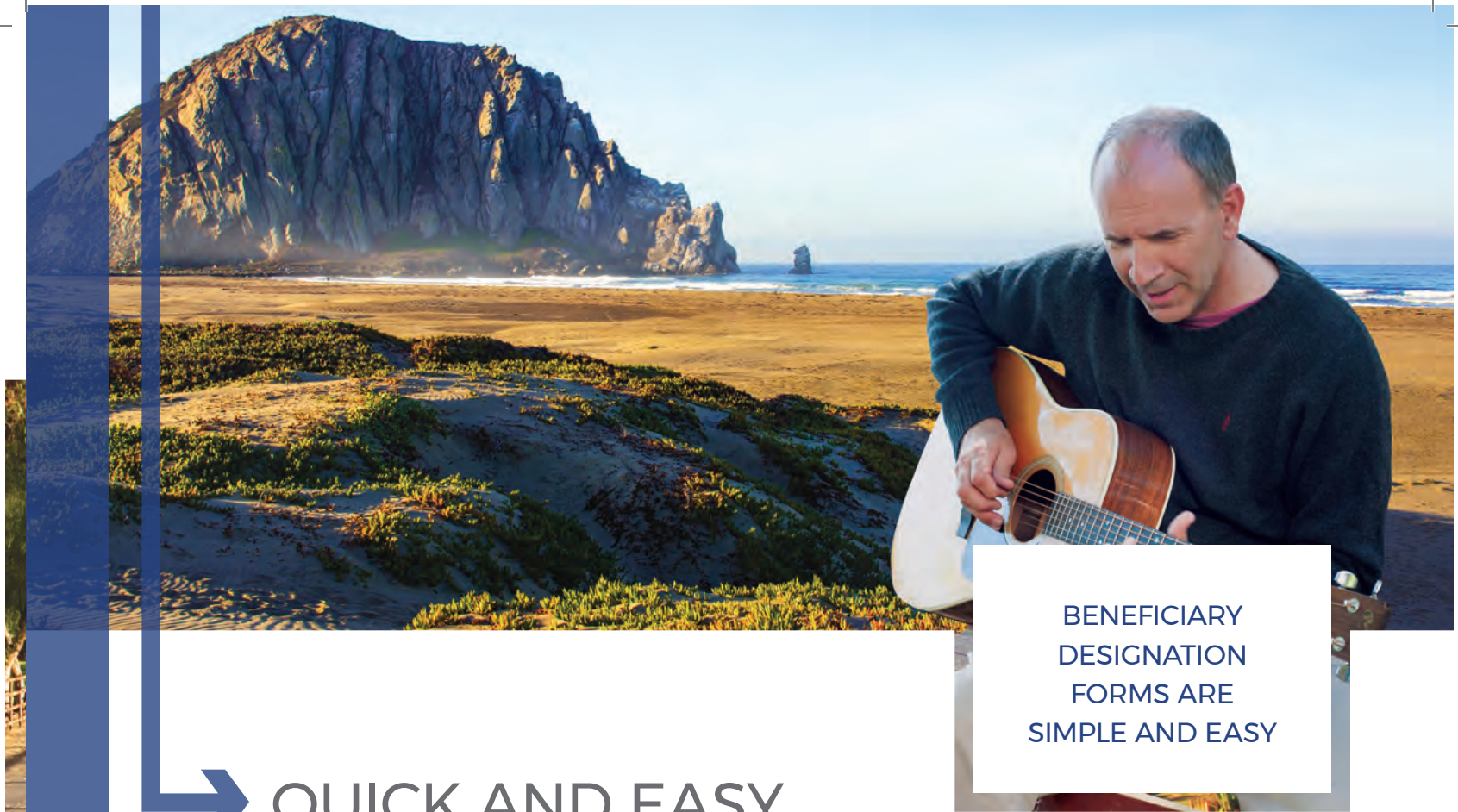
You can fund a gift annuity for yourself or for you and another person, such as your spouse.



WE CAN HELP YOU  
PLAN YOUR JOURNEY  
**AND LEAVE A HAPPY,  
JOYFUL LEGACY  
ALONG THE WAY**

Just as your travel agent might give you a map for your road trip, we will give you an illustration showing the benefits of creating a charitable gift annuity. We can tell you your payment rate, income tax deduction and possible capital gains benefits in just a few moments. If you like doing it yourself, visit our website, where we have a handy calculator for you to explore. Whether you click, call or email us, we are here to help.





BENEFICIARY  
DESIGNATION  
FORMS ARE  
SIMPLE AND EASY

## QUICK AND EASY VACATION

Sometimes the best vacations are close to home. A payable-on-death form may sound intimidating, but it is one of the easiest, most effective planning trips you can take.

With it, you can designate the family members or special causes, like your church or ministry, to receive funds automatically when you die. You can do this for many accounts including:

- Savings account
- Checking account
- Investment account
- 401(k), IRA and other retirement accounts

Just call or visit your account administrator's website to obtain the form. It only takes a few moments to complete it.



Perhaps the best feature of a beneficiary designation form is you can change your mind. Unlike other planning methods that have more formal requirements, this form can be changed any time you want. Of course, contact your professional advisor to make sure it fits your plans and tax situation. If you want more information or want to include us in your plans, call or email us, and we can help you reach this easy destination.

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## A DETOUR WORTH TAKING

Sometimes as we travel, we see problems on the road ahead and look for a way around them. Such is the case for many people with IRA accounts. If you are 72 or older, you know you must withdraw minimum funds each year from your IRA. If you have been saving in your IRA for years, the idea of withdrawing money and paying the tax from it is not very appealing. You can take a detour instead.

Rather than take the distribution yourself, take advantage of a handy detour: the IRA charitable rollover. You can transfer funds from your IRA to your church. When you do, you do not pay income taxes that would otherwise be due. It is important for your custodian to make the transfer directly to us, not taking the distribution yourself. You can do this for up to \$100,000 each year from your IRA. If your spouse has an IRA, he or she can do the same. The best part is you can start using your IRA for charitable giving as soon as you reach age 70½. Don't delay — you can take advantage of tax-favored giving from your IRA. Call or email us to see how we can help guide you through a detour that gives you a more pleasant journey as you reach your destination more quickly.

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