



Personal Planning NEWSLETTER

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THE **Keys** TO **Success**

AVOID TAXING SITUATIONS

USE THAT GROWTH FOR A GREATER GOOD.

www.canvumf.org

1350 Halyard Dr., West Sacramento, CA 95691

Numbers You Need to Know

The keys on your keyboard can be the key to your future. Use your keyboard to visit our website and learn about a charitable gift annuity. It will give you details on what a gift annuity can do for you. When you transfer stock or give cash to our organization to fund one, we send you payments for life.

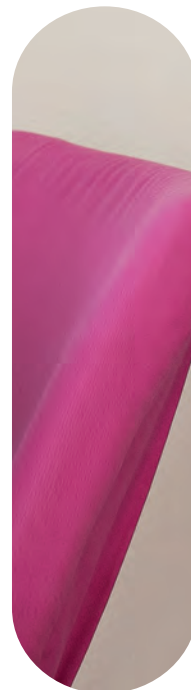
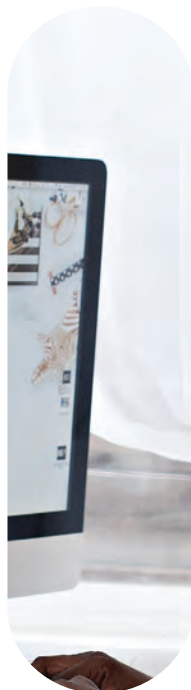
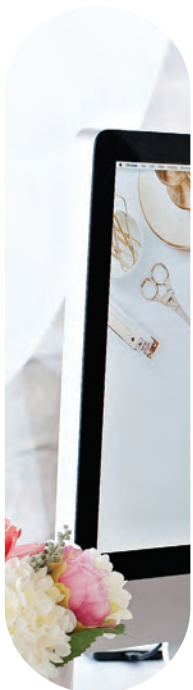
The payments are fixed and continue to you in the same amount every year (payable monthly, quarterly, or annually) for as long as you live. After a lifetime of payments, any funds remaining support your church in your name. It also offers these benefits:

◆ **An income tax deduction this year for part of the funding amount**

◆ **Capital gains benefits if you transfer stock to fund it**

◆ **You can fund one for yourself or you and another person**

Our website has a calculator that is simple to use. With it, you can learn all your benefits. There is never any obligation. Visit our website at www.canvumf.org.



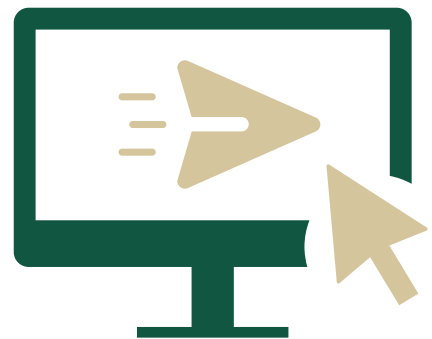


Hit “Send” on Capital Gains

If you have held your stocks for a while and they have grown, the thought of paying capital gains taxes is probably on your mind. Wouldn't it be nice if you had a “send” button on your computer that dispatches capital gains? Well, maybe that key is already there.

Visit our website to learn what you can do with your stocks that can make capital gains a little easier. You will see how selling stock is not your only option. You can transfer stock to your church and receive an income tax deduction for the present value of your stock and pay no capital gains.

Contact us to learn your options. If you want to do even more, ask us how you can use that stock to fund a gift annuity, where you get some tax benefits while receiving payments for life. Your keyboard will lead you to a less taxing future.



USE YOUR KEYBOARD
TO TRANSFER STOCK TO
YOUR CHURCH AND IN
RETURN REDUCE
CAPITAL GAINS.

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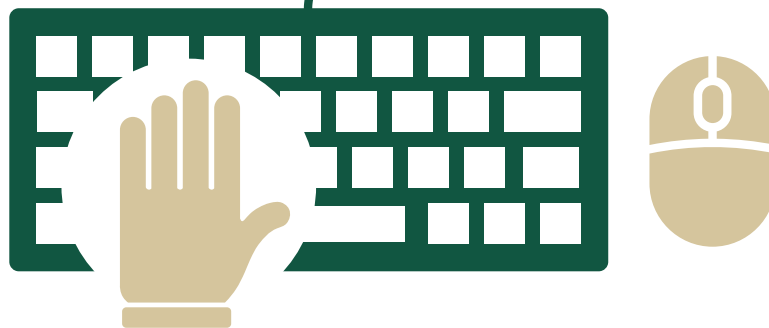


Control Your Accounts

Your keyboard is the key to your accounts. You can use it to make investment decisions and to move money between investments. There is another thing you can do with your keyboard to give you even more control.

Whether it is your savings, checking, retirement, or investment account, an important part of your legacy planning is what you want to happen with these accounts when you no longer need them. Each of these accounts has a beneficiary designation (or payable on death form) you can use to designate who you want to receive the funds in them. You can support family, friends, or your church. Visit our website to learn how this simple form makes a big difference. Your keyboard will give your accounts new life and your legacy a clearer picture.

IT IS A SIMPLE FORM THAT MAKES A BIG DIFFERENCE.
YOU CAN CHANGE THE FORM ANYTIME YOU WANT.



www.canvumfgiving.org

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