



California-Nevada
United Methodist
FOUNDATION

888-789-7374
www.canvumf.org

PERSONAL PLANNING NEWSLETTER

Spring 2023

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Plant a Gift Annuity,
Grow a Garden of Lifetime Benefits



www.canvumfgiving.org
1350 Halyard Dr., West Sacramento, CA 95691

Savings Season

Spring brings the promise of new beginnings. The season reminds us that new life is always around the corner. We can take inspiration from the growth and create a little spring of our own.

A charitable gift annuity is a permanent spring season for you. When you fund a gift annuity, you begin receiving payments back. That is a payment you can see and will return to you season after season, as long as you live. Part of your payments are also tax-free for several years.

Just as spring brings many benefits, such as longer days, warmer weather and growing flowers, your gift annuity gives you many reasons to celebrate. In addition to your fixed lifetime payments, you also receive an income tax deduction when you fund it.

If you fund your gift annuity with an appreciated asset, like stock, you also receive capital gains benefits. Some of your capital gains taxes are avoided and the remaining capital gains taxes are spread over several years.

SHARE THE GOODNESS.

GIFT ANNUITIES CAN BE FOR ONE OR TWO PEOPLE.





Bouquet of Benefits

While a gift annuity is attractive in its simplicity, you may want more benefits and control. A charitable remainder unitrust offers a bouquet of benefits. It can handle more complex assets and give you more control, including over your income stream.

If you want more control or have more complex goals, a charitable remainder unitrust (CRUT) may be right for you. A CRUT can:



Accept and handle difficult assets such as investment land or rental property



Provide better control than a gift annuity



Offer similar tax benefits

A CRUT gives you more control over the payment rate, payment schedule and allow more complex assets to be handled.



Contact us to learn how a gift annuity or charitable remainder unitrust can help you. Visit our website or email us, and we can tell you your payment rate and tax benefits. We can help you turn the seed of an idea into a garden of benefits.



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Spring for Your Checkbook

Just as spring brings new life, each gift annuity payment gives you a little boost in your bank account. Your checkbook blooms a little more. Because the payments are fixed, they are as reliable as spring sunshine, and a welcome relief from life’s other unpredictable moments. The payments and benefits continue for as long as you live, no matter what the economy does.

With your charitable gift annuity, you receive:

- *Favorable fixed payments*
- *Income tax benefits*
- *Possible capital gains benefits*



Check with your tax advisor to learn how a charitable gift annuity or charitable remainder unitrust will work for you. Call or email us and we will give you a detailed illustration showing your payment rate and tax benefits. Just like spring comes reliably every year, your payments will continue for life. After a lifetime of payments to you, your gift will benefit our organization. Your lifetime of payments grows to becomes your legacy.

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