

Peace of Mind Gift Annuity

Many years ago, Ruth Jones bought a home. Since she was very pleased with the home, she decided to buy stock in the company that built and sold her home. Over the years, the stock has increased in value many times.

Ruth: This stock was a good investment. I have enjoyed my home and I thought if I like my home, other people would like theirs. Because I was a happy homeowner, I purchased the shares of stock in this homebuilder.

While the stock has gone up in value several times, I am now tired of guessing the market. In the last few years, the stock has gone up and down in value. I think it would be much better to have a good fixed return and not worry about the stock markets.

Ruth called her church and discovered that she could receive a return of almost 8%, based upon her age. This fixed payment was in addition to a large income tax deduction. Ruth decided to transfer \$100,000 of appreciated stock to her church.

Ruth: I am delighted with my gift annuity. I receive 8% and saved over \$5,000 in income taxes. This plan has been great. Best of all, I no longer have to watch the markets go up and down. I now have peace of mind.

For more information on Planned Giving Strategies, please, feel free to ask your Pastor.

Disclaimer

These donor stories are for illustrative purposes. Each story is based on an actual gift case or a combination of cases. The names are not representative of the actual donors who were involved in either the cases or the combination of cases. Source: AGFinancial.