

## A Gift That Pays You Income For Life

### *Charitable Gift Annuity*

You can help people facing Alzheimer's disease with a gift that pays you income for the rest of your life. It's called a charitable gift annuity, and creating one with the Alzheimer's Association offers a steady stream of income that never decreases. Your gift annuity will help the Association continue our mission to lead the way to end Alzheimer's and all other dementia — by accelerating global research, driving risk reduction and early detection and maximizing quality care and support.

### How You Benefit



- **Receive payments that never decrease.** You receive fixed payments for the rest of your life — the amount will never change.



- **Lower your taxes.** Charitable gift annuities may offer a charitable income tax deduction in the year you make your gift if you itemize your deductions. If you create your gift annuity using appreciated stock or mutual fund shares, you may also save on capital gains taxes.



- **Provide income for others.** Charitable gift annuities can be set up so that payments are made to either one or two beneficiaries. This is a creative way to ensure financial stability for a spouse, family member or friend.



- **Make a difference.** You can feel good knowing that your gift to the Alzheimer's Association will help the millions of people facing Alzheimer's and all other dementia.

**With these benefits and more, it's no wonder charitable gift annuities are a very popular giving option.**



## How a Gift Annuity Can Work for You

1. **Make** a gift to the Alzheimer's Association of \$10,000 or more to fund a charitable gift annuity.
2. **Receive** fixed payments for the rest of your life or the lives of up to two people you choose. The amount of these payments will never change, and you may receive a charitable income tax deduction this year if you itemize your deductions.
3. **Enjoy** the satisfaction of knowing your gift benefits you now and the Alzheimer's Association later to move toward our vision of a world without Alzheimer's and all dementia.



## How Is Your Rate Determined?

The payment rate of your gift annuity is based on the age of the beneficiary and whether the annuity benefits one person or two. The beneficiary must be at least 62 or older — and the older they are, the higher the rate. The Alzheimer's Association follows rates recommended by the American Council on Gift Annuities.

*“I found a great way to donate that also provides me money for my retirement, which is important because I don't think of myself as a wealthy man. I receive income from a charitable gift annuity, and that really helps during retirement. Plus, it feels good knowing that when I no longer need it, the rest of the money will go toward care, support and research for Alzheimer's disease.”*

*- Tom L.*

## See Your Benefits

For a no-obligation, customized charitable gift annuity proposal based on the age and number of beneficiaries and when you would like payments to begin, please contact:

Jill Workman, Senior Director, Planned Giving  
Alzheimer's Association

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Learn more about ways to create your legacy at [alz.org/plannedgiving](https://alz.org/plannedgiving).

Charitable gift annuities may not be available in your state. The Alzheimer's Association adheres to all local, state and federal regulations related to charitable gift annuities. Content is for educational and illustrative purposes only and is not professional tax or legal advice. It is important to consult with a tax advisor about your specific situation and whether your gift is deductible.