

## A Good Measure

Scripture tells us that in the act of giving we receive more than we thought imaginable. Most of us experience the reality of this truism through the eyes of a child, the gratitude of a life changed, or through the vision that is inherent in the spirit of philanthropy.

Some may find it surprising that U.S. tax laws take this reality one step further and provide tangible evidence that a charitable gift changes much more than the charity on the receiving end. It is with this purpose in mind that our laws embrace planning strategies like the charitable gift annuity, offering many incentives that nurture a philanthropic society.

*Give, and it will be given to you.  
A good measure, pressed down,  
shaken together and running over,  
will be poured into your lap.  
For the measure you give  
will be the measure you get back.*

~ Luke 6:38



As a Catholic ministry of relief and development, Cross Catholic Outreach strives to aid the poorest of the poor in the name of Christ. We consider every donation as a gift from God, and we consider ourselves honored stewards of those gifts. When you include Cross Catholic Outreach in your estate plan, you become our *Legacy Mission Partner*.



To discuss your legacy, contact

### **Cross Catholic Outreach**

#### **Office of Gift Planning**

2700 N. Military Trail, Suite 300

PO Box 273908

Boca Raton, FL 33427-3908

[giftplanning@crosscatholic.org](mailto:giftplanning@crosscatholic.org)

800-914-2420 ext. 239

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For further information and resources including interactive gift planning calculators, visit our website at:

[CrossCatholicLegacy.org](http://CrossCatholicLegacy.org)

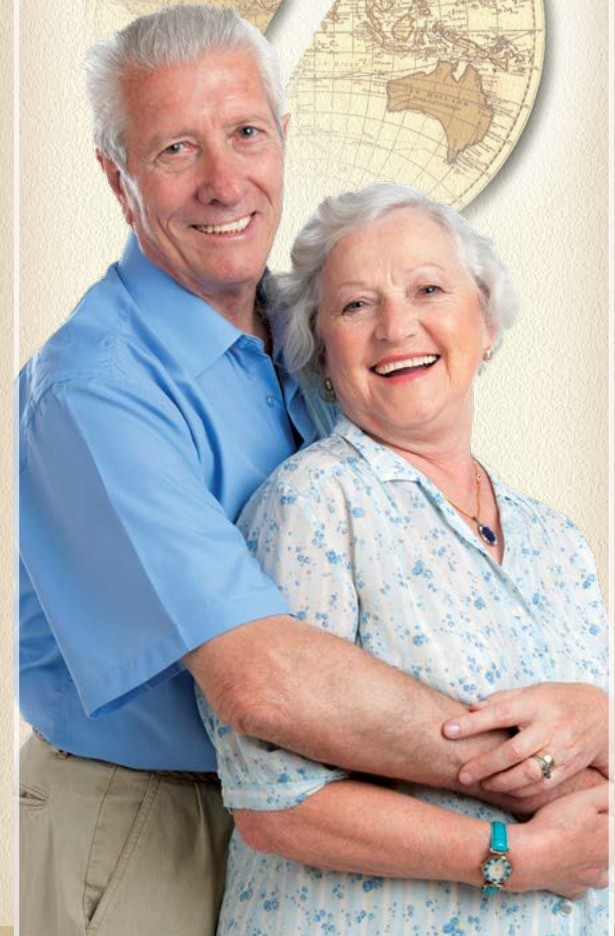


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# *In Giving, You Receive*

## *The Charitable Gift Annuity*





## *What is a Charitable Gift Annuity?*

A Charitable Gift Annuity is an agreement between you and a charity such as Cross Catholic Outreach. When you transfer your cash or appreciated property to Cross Catholic Outreach, we agree to pay you income for the rest of your life and, if you desire, that of your spouse or other beneficiary. Your payment will be fixed, which means that your income will never change. Your rate is based on your age and the age of any other beneficiary at the time you make the agreement with us.

**What are the Benefits?** There are many benefits to establishing a Charitable Gift Annuity. In addition to fixed income for life, you will receive a charitable income tax deduction to reduce your taxes in the year you make your gift. If you make a gift of appreciated property such as stock or real estate, you may also avoid paying some of the capital gains tax on the sale of your property. The gift annuity also provides satisfaction in knowing you will help the poorest of the poor as an act of stewardship.

**How is My Gift Annuity Taxed?** A gift annuity produces ordinary income that will be taxed at your normal income tax rate. However, if your gift is appreciated property, a portion of your income will be taxed at the lower capital gains tax rate. A portion of your income could even be tax-free if you make a gift of cash or appreciated property.

**Can My Income Be Deferred?** You may choose to fund a Charitable Gift Annuity now, but defer receiving payments until retirement or some future date, when you or your spouse or other beneficiary may need the additional income. Your future payment rate will be higher and you will benefit from a tax deduction the year you make the gift.

**Calculate Your Benefits** Would you like to see the benefits of creating a Charitable Gift Annuity? You can use the Gift Annuity Calculator on our website to estimate income projections or tax deductions based on your gift of cash or appreciated property. Go to **CrossCatholicLegacy.org**.



## *How a Gift Annuity Works*

### **Three Easy Steps**

- 1. Sign a contract** ~ In a written agreement, you give your asset to Cross Catholic Outreach.
- 2. Get lifetime income** ~ Payments are made to you, or another beneficiary, in regular installments. You also receive a tax deduction.
- 3. Leave a legacy** ~ The value of your gift goes to Cross Catholic Outreach, to benefit the worldwide mission you designate — feeding, schooling, housing, or other area of outreach to the poor.

