



Your Most Enduring Gift

After first providing for your loved ones, please consider making a provision for Plan International USA in your will or trust for the children, families, and communities who benefit from our work. Your gift may be a fixed amount, a percentage of your estate, or all or part of the estate residue.

Please visit our website for suggested language:

<http://www.planusa.org/estateplanning>

For your documents please note our legal name and address:

Plan International USA

155 Plan Way
Warwick, RI 02886-1099
(401) 738-5600

Our Tax-ID number is 13-5661832.

If you have questions about how you can help with a gift through your estate, please contact our Office of Gift Planning:

(800) 556-7918

**or email us at
PersonalGiving@PlanUSA.org**

We hope you will let us know when you include Plan International USA in your estate plans. We would like to recognize you as a member of our Brighter Futures Society – our society for friends who have shared their intentions with us to ensure a more promising future for those we serve.



LEAVE A LEGACY®

Make a Difference in the Lives that Follow...



Plan Promising Futures,
Community by Community

155 Plan Way , Warwick, RI 02886
1-800-556-7918

www.planusa.org

**Charitable
Gift Annuity**



Plan Promising Futures,
Community by Community

www.planusa.org

Make a larger gift than you ever thought possible...with benefits for you and children around the world.



A Charitable Gift Annuity (CGA) is a simple contractual agreement between you and Plan International USA. In exchange for a gift of cash or appreciated securities (\$10,000 minimum), Plan will make a fixed annual payment to you for life.* At the end of your life, whatever assets remain will support our mission of helping children and communities in need globally.

The “annuity” portion is the payment you will receive. The “gift” portion is the amount we will receive after your death.

There are many benefits to a CGA. You’ll receive a charitable income tax deduction in the year you set up the gift, and a portion of the payments you receive each year are tax free. In addition, you’ll receive favorable treatment on capital gains should you establish a CGA with appreciated stock.

A CGA can be established to make payments to one person for life or jointly for two people over both lifetimes, most frequently between spouses.

Don’t Need the Income Now?

If you don’t need the income now, a Deferred CGA may be a good choice. You decide when your payments will begin. The longer you defer your annuity payments, the higher the payout rate will be.

CGAs – both immediate and deferred – are irrevocable. After your lifetime the remainder of your gift will be used to continue supporting our work of helping children and communities, carrying on your legacy of caring.

*Rates are based on the American Council on Gift Annuities recommendations and are subject to change. See the enclosed card for a sample of the most current rates available. You must be at least age 60 when your payments begin.

The purpose of this brochure is to provide information of a general nature only. Plan International USA is not engaged in providing legal or tax advice. Please consult your attorney or financial advisor when considering a charitable gift of any type.



Your Benefits include:

- Plan International USA will pay one or two annuitants a fixed income each year for as long as either one lives, often at rates higher than most CDs.
- You receive a charitable income tax deduction, if you itemize your taxes.
- Payments can be made to you annually, semi-annually, or quarterly and deposited directly into your bank account or mailed to your residence.
- A portion of your income will be tax free.
- You will have the satisfaction of knowing you will continue to help children and communities in need.

If you would like to discuss the benefits of establishing a CGA, or if you would like a confidential illustration, please call us at (800) 556-7918. You are also welcome to complete and return the reply card for a personalized, no-obligation illustration of how a CGA can benefit you and the children we serve.

Visit us on the web:
www.planusa.org/estateplanning

Yes, I am interested in establishing a Charitable Gift Annuity. I understand payment rates and other benefits are based on age. Please send me a gift annuity illustration – my date of birth is _____.

My spouse’s date of birth is *(if you are interested in a joint annuity)* _____.

Please call me – I would like to discuss the benefits of creating a CGA with Plan International USA. The best time to reach me by phone is _____.

I would like more information about CGAs. Please send me additional information.

NAME

ADDRESS

CITY/STATE/ZIP

PHONE

E-MAIL



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