

Praise for Gift Annuities

What the Experts Say

Consider a charitable gift annuity. If you choose well, you'll get an immediate tax deduction, a decent return, zero volatility and the psychic pleasure of supporting a worthy cause.
~Forbes.com

What Audubon Annuitants Say

The regular payments are great but what makes me even happier is knowing that even when I'm gone, my gift will help Audubon protect the birds I love.
~Jan Roberts, Audubon annuitant

What Will My Payment Be?

To receive a customized example of your gift annuity payment rate, annual payment and tax savings, request a proposal by contacting us at plannedgifts@audubon.org or (512) 236-9076. There is no obligation to learn more.



Help Audubon protect birds for future generations with a charitable gift annuity.

Benefits For You

Receive an attractive payment rate. Rates go as high as 9 percent, depending on your age and whether the annuity benefits one person or two.

Lower your taxes two ways. In addition to the charitable income tax deduction for your donation, if you use appreciated stock to fund your gift annuity you will avoid some of the capital gains taxes you might otherwise owe on the sale.

Enjoy fixed payments. Your annual payment will never change once your gift annuity is established and will continue regardless of market fluctuations.

Provide financial security for a spouse, parent or other loved one. With a gift annuity to benefit two people, payments are made for as long as either beneficiary lives.

Realize a higher payment rate. Defer the start of your payments and enjoy a higher rate than if you start your payments immediately.

This publication is not intended as legal, accounting or other professional advice. For assistance in charitable planning, always engage the services of a qualified professional.

We're here to help.

To discuss the best option for you—or to notify us that you have left a gift to Audubon in your will or trust—please contact us.



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**More information about
easy ways to create
your conservation legacy is at
www.Audubon.PlanYourLegacy.org**



Photo credit: American Robin eggs / Don Billett

Enhance Your Nest Egg Today . . . and Leave a Gift for Tomorrow

With a Charitable Gift Annuity



A More Secure Future for You and the Birds You Love, Too

When you create a gift annuity with Audubon, you receive fixed payments, for as long as you live—at an attractive payment rate, and a charitable income tax deduction now. Your gift will help conserve birds, other wildlife, and their habitat for future generations to behold and enjoy.

Easy as 1, 2, 3

1. You make an irrevocable donation to Audubon of at least \$10,000. You must be age 65 or older.
2. Your payments continue for as long as you live. Our charitable gift annuities are backed by the entire assets of the National Audubon Society.
3. You benefit now from annual payments and an immediate charitable income tax deduction while creating your conservation legacy.



Your annual payment rate never changes once your gift annuity is established—no matter what happens in the stock market or the economy.

Calculating Your Payments

Your annual payment rate is based on your age at the time you establish your gift annuity. The older you are, the higher the rate. The following chart shows the rates for one annuitant and a donation of \$25,000.

Your age	78	84	88
Your payment rate*	6.4%	7.6%	8.4%
Your annual payment	\$1,600	\$1,900	\$2,100

*Rates as of July 1, 2014.

For rates not listed here, for rates for two annuitants, and for higher rates when you defer your payments to a later date, contact us at (512) 236-9076 or plannedgifts@audubon.org.



In every flyway across the U.S. charitable gift annuities are helping protect Sandhill Cranes and other migratory birds.

Q & A More about Gift Annuities

Q. How often do I receive payments?

A. You decide. Your payments can be sent quarterly, semiannually or annually. Your payments can be directly deposited just like your Social Security check.

Q. Is there a minimum amount or age required to establish a gift annuity?

A. Yes. You must be age 65 or older. However, if you are younger, you can create a gift annuity if you defer payments to a later date—usually when you are entering retirement. The minimum donation to establish a gift annuity is \$10,000.

Q. Can my gift annuity provide payments for someone besides me?

A. Yes! Your gift annuity can benefit a person other than yourself, such as a parent. Gift annuities may provide payments for up to two people—such as you and a spouse, or two parents.

Q. What paperwork do I need to keep for tax purposes?

A. Audubon sends you tax statements that describe how much income you received and how it's taxed.

Q. What should I do next?

A. Contact us! We'll be happy to provide you with calculations that show your payment rate and tax savings based on your unique situation.

Q. May I designate my gift to a specific Audubon program?

A. Yes! You may specify that your gift be left unrestricted to Audubon, or dedicated to your favorite Audubon state office, nature center or program.



The joy of seeing glorious birds like this Painted Bunting can be preserved for future generations by establishing an Audubon charitable gift annuity.