

Charitable Gift Annuity



Are you looking for a secure source of fixed income for now or your future?

You may be tired of living at the mercy of the fluctuating stock and real estate markets. One solution is a charitable gift annuity.

How it Works

A charitable gift annuity is a contract between you and Make-A-Wish® Orange County and the Inland Empire.

1. You transfer property to Make-A-Wish Orange County and the Inland Empire. In exchange we pay you fixed income for life.
2. The fixed income can be quite high depending on your age.
3. A portion of your income stream may even be tax-free.
4. You will receive a charitable deduction for your gift of the remainder to Make-A-Wish Orange County and the Inland Empire and the satisfaction of furthering our mission.

Types of Assets You May Give

- If you decide to fund your gift annuity with cash, a significant portion of the annuity income will be tax-free.
- You may make a gift of your appreciated securities to fund a gift annuity and avoid a portion of the capital gains tax.

Start Receiving Payments Now with a Current Gift Annuity

If you desire current income, you may transfer property in exchange for our promise to pay you fixed income beginning as early as this year. You will receive a current income tax charitable deduction for the value of your gift to Make-A-Wish Orange County and the Inland Empire.

Deferred Gift Annuity for Income at Future Date

Perhaps you are not ready to begin receiving income until a future date, such as when you retire. You can establish a deferred gift annuity, receive a current charitable income tax deduction and receive payments at a designated future time. Best of all, because you deferred your payments, your annual payment will be higher than with a current annuity. Contact us about flexible date options for your future income.