

FUND A CHARITABLE GIFT ANNUITY

Enjoy Fixed Income for Life

CURRENT AGE	PAYOUT BEGINS	FIXED RATE
50	At Age 65	11.6%
55	At Age 65	9.2%
60	At Age 65	7.3%
65	Immediately	5.7%
70	Immediately	6.3%
75	Immediately	7.0%
80	Immediately	8.1%
85	Immediately	9.1%
90	Immediately	10.1%

Payments may begin as early as age 50 at reduced rates.

Key Features of a Gift Annuity

- A guaranteed fixed income; a portion will be tax-free for a period of years
- A charitable income tax deduction
- A generous gift to the University, to be used as you direct

In return for your gift of cash or securities the University agrees to make fixed quarterly payments to one or two annuitants you name, for life. Individuals over age 70½ may be able to take advantage of special rules for using funds from a traditional Individual Retirement Account. Contact us for details.

Please consult your attorney or financial advisor about the applicability to your own situation of the legal principles contained herein.



IMAGINE YOUR LEGACY

For a confidential personal illustration or more information about charitable gift annuities, tax-wise giving or other gift planning opportunities that return income to you, please contact:

University of Rochester
Office of Trusts, Estates & Gift Planning
Box 278799 | Rochester, NY 14627-8897

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RATES EFFECTIVE JAN 1, 2024