

## Charitable Gift Annuities

**Charitable Gift Annuities** offer you a way to receive income for life and support the work and mission of the **Henri Nouwen Society**.

### When to Consider a Charitable Gift Annuity

- You're over age 65
- You'd like to support the **Henri Nouwen Society** now or on your death or on the death of your spouse
- You're in need of the income during your lifetime
- You're looking for an alternative to GICs
- The interest on the majority of your investments is fully taxable

### How it Works

**Charitable Gift Annuities** are investment vehicles that offer the same income security as GICs, but with better cash flow.

If you make an irrevocable gift of capital to the **Henri Nouwen Society** for a gift plus annuity, part of the funds becomes a gift to the **Henri Nouwen Society** for which you receive an immediate tax receipt.

The gift portion will be determined by you and the **Henri Nouwen Society**, but must be a minimum of 20%. The remaining funds are used by the **Henri Nouwen Society** to purchase you an annuity from a top-rated insurance company.

You'll receive guaranteed income for life.

### How You'll Benefit

- **Guaranteed income for life**
- **A charitable tax receipt for the gift portion**
- **The annual income you receive from the annuity can be all, or largely, tax-free**
- **You'll see your gift in action during your lifetime through the Henri Nouwen Society**
- **Avoid probate fees as the annuity is outside your estate**

The amount of your annuity will depend on variables such as your age and the current rates. The older you are at the time of the annuity, the better your return. You can contract for a single or a joint annuity with your spouse, with a last-to-die clause.

A **Charitable Gift Annuity** requires a minimum investment of \$10,000 with a minimum gift of \$2,000 (20% of the investment).

For more information, please contact:

**Colette Halferty**

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### Always Seek Financial and Legal Advice

*We strongly recommend you seek professional advice to ensure that your financial goals are considered, your tax situation reviewed, and your Planned Gift is tailored to your circumstances.*