

NOT YOUR FATHER'S GIFT ANNUITY

A gift plan for younger donors.



PEDDIE

ARE YOU BETWEEN AGE 40-60?

The traditional charitable gift annuity is a perfect giving strategy for someone who is retired and wants the safe and steady payments this giving instrument provides. But that's not you. Creative twists on this gift offer younger donors all the benefits with more flexibility.

CONSIDER THE TUITION ANNUITY AS A CREATIVE SUPPLEMENT TO OTHER TAX-SHELTERED SAVINGS PLANS FOR YOUR CHILDREN'S TUITION NEEDS.

START YOUR PAYMENTS WHEN YOU'RE READY FOR THEM WITH A FLEXIBLE GIFT ANNUITY.

This is a simple agreement between you and Peddie School in which we commit to make fixed payments to you for life beginning at a future date, in return for your gift to us. You choose an initial target date around the time you think you'd like to begin receiving payments. We present you with a range of rates for your flexible gift annuity, based on dates around that target date you've set. As you get closer to retirement, you

let us know when to start sending you payments. The older you are when payments start, the larger your payments will be. Your charitable income tax deduction, which you claim when you create your flexible gift annuity, will be based on the earliest target date in the range we've agreed to.

PLANNING POINTS:

- You can add a spouse or other loved one as beneficiary of your flexible gift annuity, or tell us to make payments to a friend or loved one instead of you.
- You can set up a series of flexible gift annuities as you approach retirement. You may consider funding them with assets you had already budgeted for retirement saving but can no longer add to an overfunded retirement plan. The annuities will begin making a combined payment on the date you select.

INTERESTED?

Contact us. We'd be glad to collaborate with your advisors to create a gift plan uniquely suited to you.

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Peddie School provides support for a full range of charitable gift planning options and services. Peddie School, its employees or representatives, do not offer legal or financial advice.