

# How A Charitable Gift Annuity Works.

Minimize Your Taxes and Maximize Your Gift.



Charitable Gift Annuity Agreement



Charitable Gift Annuity

1. Donation from Donor to Charity
2. Foundation for Community Care administers, invests and provides the vehicle to make gift charitable
3. State of Montana - offers Tax Credit
4. Federal Government - offers Tax Deduction

Donation To  
Foundation for Community Care  
Donor Restricted Endowment Fund

IS THE GIFT A DEFERRED GIFT ANNUITY?

YES

NO

Payments begin at a later date (determined by you and FFCC) which increases tax deduction, tax credit and payment amounts

Annuity payments based on gift amount and age. Payments begin when gift finalized.

Annuity payments for life at established date.

Upon death, remainder to Foundation for Community Care.

NO

After 5 years may decline annuity payments for additional tax deduction.

Upon death, remainder to Foundation for Community Care

YES

Remainder goes to the Foundation for Community Care within lifetime and Donor gets additional deduction



FOUNDATION FOR COMMUNITY CARE

MONTANA OFFICE OF GIFT PLANNING  
MONTANA COMMUNITY FOUNDATION

"Let us help you create your planned gift today!"

