

This is a sample primary Summary of Benefits chart. All of the variables that will be drawn from the BatchCalcs file are shown in bold. The pages that follow show three Summary of Benefits charts generated by merging this primary chart with sample data in the BatchCalcs file. Notice how the values change from chart to chart.

«Charity_Name»

Prepared for:
«Prospect_name»
March 28, 2007

Summary of Benefits

«Payout_Rate» **Charitable Gift Annuity**

ASSUMPTIONS:

Annuitants	[«Birthdate_1»] «Age_1»
Date of Gift	[«Birthdate_2»] «Age_2» «Gift_Date»
Principal Donated	«Amount»
Annuity Rate	«Payout_Rate»
Payment Schedule	Quarterly

BENEFITS:

Charitable Deduction	«Deduction»
Annuity	«Annual_Payment»
Tax-free Portion	«Taxfree_income»
Ordinary Income	«Ordinary_Income»

After «Expected_return_years» years from the year the payments begin, the entire annuity becomes ordinary income.

Prepared by: Jane Fundraiser

IRS Discount Rate is «AFR»%

These calculations are for illustration purposes only and should not be considered legal, accounting, or other professional advice. Your actual benefits may vary depending on the timing of the gift.

Summary of Benefits

8.0% Charitable Gift Annuity**ASSUMPTIONS:**

Annuitants	[08/24/1925] 81
Date of Gift	[01/14/1924] 83 12/01/2006
Principal Donated	\$10,000.00
Annuity Rate	8.0%
Payment Schedule	Quarterly

BENEFITS:

Charitable Deduction	\$5,000.12
Annuity	\$800.00
Tax-free Portion	\$300.00
Ordinary Income	\$500.00

After 7.8 years from the year the payments begin, the entire annuity becomes ordinary income.

Summary of Benefits

7.4% Charitable Gift Annuity**ASSUMPTIONS:**

Annuitants	[11/30/1932] 84 [01/02/1934] 73
Date of Gift	12/01/2006
Principal Donated	\$10,000.00
Annuitant Rate	7.4%
Payment Schedule	Quarterly

BENEFITS:

Charitable Deduction	\$6,000.15
Annuity	\$740.00
Tax-free Portion	\$260.00
Ordinary Income	\$480.00

After 10.1 years from the year the payments begin, the entire annuity becomes ordinary income.

Summary of Benefits

11.3% Charitable Gift Annuity**ASSUMPTIONS:**

Annuitants	[11/09/1913] 93
Date of Gift	12/01/2006
Principal Donated	\$50,000.00
Annuitant Rate	11.3%
Payment Schedule	Quarterly

BENEFITS:

Charitable Deduction	\$32,353.50
Annuity	\$5,650.00
Tax-free Portion	\$4,412.65
Ordinary Income	\$1,237.35

After 4.0 years from the year the payments begin, the entire annuity becomes ordinary income.