

*This is a sample primary letter. All of the variables that will be drawn from the BatchCalcs file are highlighted. The pages that follow show three letters generated by merging this primary letter with sample data in the BatchCalcs file. Notice how the values in the third paragraph change from letter to letter.*



«AddressBlock»

Dear «Salutation»,

Thank you for your generous support of the work we do at «Charity\_Name».

As a participant in our gift annuity program, I know you are familiar with the benefits of a charitable gift annuity. Establishing an additional gift annuity in 2007 will not only provide you with fixed payments for life and an immediate charitable income tax deduction, but also with the satisfaction of knowing that you are enhancing the financial strength of the «Charity\_Name».

If you were to create another gift annuity for the same annuitants this year with «Amount» in cash, you will receive a charitable income tax deduction of approximately «Deduction» and the annuitants will receive annual payments of «Annual\_Payment» for the rest of their lives. What's more, «Taxfree\_income» of the payments you receive each will be tax-free during the first «Expected\_return\_years» years.

You can also establish a gift annuity with publicly-traded securities or other appreciated property. You may be able to avoid tax on a significant portion of your capital gain in these assets when you use them to fund a gift annuity.

If you would like to establish another gift annuity with «Charity\_Name» or have any questions about how you can support our work, please call me at 333-222-1111 or e-mail me at [jfundraiser@su.edu](mailto:jfundraiser@su.edu).

Thank you again for your generous support of «Charity\_Name».

Sincerely,

Jane Fundraiser  
Director of Gift Planning



Joe Smith  
1 Elm St.  
Boston, MA 02134

Dear Joe,

Thank you for your generous support of the work we do at State University.

As a participant in our gift annuity program, I know you are familiar with the benefits of a charitable gift annuity. Establishing an additional gift annuity in 2007 will not only provide you with fixed payments for life and an immediate charitable income tax deduction, but also with the satisfaction of knowing that you are enhancing the financial strength of State University.

If you were to create another gift annuity for the same annuitants this year with \$10,000 in cash, you will receive a charitable income tax deduction of approximately \$5,000 and the annuitants will receive annual payments of \$800 for the rest of their lives. What's more, \$300 of the payments you receive each will be tax-free during the first 7.8 years.

You can also establish a gift annuity with publicly-traded securities or other appreciated property. You may be able to avoid tax on a significant portion of your capital gain in these assets when you use them to fund a gift annuity.

If you would like to establish another gift annuity with State University or have any questions about how you can support our work, please call me at 333-222-1111 or e-mail me at [jfundraiser@su.edu](mailto:jfundraiser@su.edu).

Thank you again for your generous support of State University.

Sincerely,

Jane Fundraiser  
Director of Gift Planning



Fred Flintstone  
100 Avon St.  
Apt. 3B  
Santa Fe, NM 84324

Dear Mr. Flintstone,

Thank you for your generous support of the work we do at State University.

As a participant in our gift annuity program, I know you are familiar with the benefits of a charitable gift annuity. Establishing an additional gift annuity in 2007 will not only provide you with fixed payments for life and an immediate charitable income tax deduction, but also with the satisfaction of knowing that you are enhancing the financial strength of State University.

If you were to create another gift annuity for the same annuitant this year with \$10,000 in cash, you will receive a charitable income tax deduction of approximately \$6,000 and the annuitant will receive annual payments of \$740 for the rest of the annuitant's life. What's more, \$260 of the payments you receive each will be tax-free during the first 10.1 years.

You can also establish a gift annuity with publicly-traded securities or other appreciated property. You may be able to avoid tax on a significant portion of your capital gain in these assets when you use them to fund a gift annuity.

If you would like to establish another gift annuity with State University or have any questions about how you can support our work, please call me at 333-222-1111 or e-mail me at [jfundraiser@su.edu](mailto:jfundraiser@su.edu).

Thank you again for your generous support of State University.

Sincerely,

Jane Fundraiser  
Director of Gift Planning



Walter F. Johnson  
123 Annapolis Street  
Annapolis, MD 23165

Dear Mr. Johnson,

Thank you for your generous support of the work we do at State University.

As a participant in our gift annuity program, I know you are familiar with the benefits of a charitable gift annuity. Establishing an additional gift annuity in 2007 will not only provide you with fixed payments for life and an immediate charitable income tax deduction, but also with the satisfaction of knowing that you are enhancing the financial strength of State University.

If you were to create another gift annuity for the same annuitant this year with \$50,000 in cash, you will receive a charitable income tax deduction of approximately \$32,353 and the annuitant will receive annual payments of \$5,650 for the rest of the annuitant's life. What's more, \$4,412 of the payments you receive each will be tax-free during the first 4 years.

You can also establish a gift annuity with publicly-traded securities or other appreciated property. You may be able to avoid tax on a significant portion of your capital gain in these assets when you use them to fund a gift annuity.

If you would like to establish another gift annuity with State University or have any questions about how you can support our work, please call me at 333-222-1111 or e-mail me at [jfundraiser@su.edu](mailto:jfundraiser@su.edu).

Thank you again for your generous support of State University.

Sincerely,

Jane Fundraiser  
Director of Gift Planning