

This is a sample primary Summary of Benefits chart. All of the variables that can 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.

State University

Prepared for:
«**Prospect_name**»
September 15, 2010

Summary of Benefits

«**Payout_Rate**» **Charitable Gift Annuity**

ASSUMPTIONS:

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

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: Fundraiser name here

IRS Discount Rate is 2.4%

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.

State University

Prepared for:
Mr. and Mrs. Smith
September 15, 2010

Summary of Benefits

7.3% Charitable Gift Annuity

ASSUMPTIONS:

Annuitant	[08/24/1925] 85
Date of Gift	[01/14/1924] 87 9/15/2010
Principal Donated	\$10,000
Annuity Rate	7.3%
Payment Schedule	Quarterly

BENEFITS:

Charitable Deduction	\$4,696.80
Annuity	\$730.00
Tax-free Portion	\$589.11
Ordinary Income	\$140.89

After 9.0 years from the year the payments begin, the entire annuity becomes ordinary income.

Prepared by: Fundraiser name here

IRS Discount Rate is 2.4%

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Summary of Benefits

6.0% Charitable Gift Annuity

ASSUMPTIONS:

Annuitant	[11/30/1932] 78
Date of Gift	[01/02/1934] 77 9/15/2010
Principal Donated	\$10,000
Annuity Rate	6.0%
Payment Schedule	Quarterly

BENEFITS:

Charitable Deduction	\$3,395.10
Annuity	\$600.00
Tax-free Portion	\$455.40
Ordinary Income	\$144.60

After 14.5 years from the year the payments begin, the entire annuity becomes ordinary income.

Summary of Benefits

7.2% Charitable Gift Annuity

ASSUMPTIONS:

Annuitant	[11/09/1930] 80
Date of Gift	9/15/2010
Principal Donated	\$10,000
Annuity Rate	7.2%
Payment Schedule	Quarterly

BENEFITS:

Charitable Deduction	\$4,727.60
Annuity	\$720.00
Tax-free Portion	\$560.88
Ordinary Income	\$159.12

After 9.4 years from the year the payments begin, the entire annuity becomes ordinary income.