

*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, 2011

## **Summary of Benefits**

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**«Payout\_Rate» Charitable Gift Annuity**

### **ASSUMPTIONS:**

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

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### **BENEFITS:**

<b>Charitable Deduction</b>	<b>«Deduction»</b>
<b>Annuity</b>	<b>«Annual_Payment»</b>
Tax-free Portion	<b>«Taxfree_income»</b>
Ordinary Income	<b>«Ordinary_Income»</b>

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, 2011

## **Summary of Benefits**

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### ***7.6% Charitable Gift Annuity***

#### **ASSUMPTIONS:**

Annuitant	[08/24/1926] 85
Date of Gift	09/15/2011
Principal Donated	\$10,000.00
Annuity Rate	7.6%
Payment Schedule	Quarterly

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#### **BENEFITS:**

<b>Charitable Deduction</b>	<b>\$4,478.80</b>
<b>Annuity</b>	<b>\$760.00</b>
Tax-free Portion	\$613.32
Ordinary Income	\$146.68

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%

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:  
Fred and Wilma Flintstone  
September 15, 2011

## Summary of Benefits

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### *6.0% Charitable Gift Annuity*

#### **ASSUMPTIONS:**

Annuitant	[11/30/1933] 78
Date of Gift	09/15/2011
Principal Donated	\$10,000.00
Annuity Rate	6.0%
Payment Schedule	Quarterly

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#### **BENEFITS:**

<b>Charitable Deduction</b>	<b>\$3,395.10</b>
<b>Annuity</b>	<b>\$600.00</b>
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.

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.

## Summary of Benefits

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### *7.5% Charitable Gift Annuity*

#### **ASSUMPTIONS:**

Annuitant	[11/09/1931] 80
Date of Gift	09/15/2011
Principal Donated	\$10,000.00
Annuity Rate	7.5%
Payment Schedule	Quarterly

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#### **BENEFITS:**

<b>Charitable Deduction</b>	<b>\$4,507.90</b>
<b>Annuity</b>	<b>\$750.00</b>
Tax-free Portion	\$584.25
Ordinary Income	\$165.75

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