



Wednesday, June 29, 2022

THE CONSTANT **CONCIERGE**

Do you have a vacation spot that you like to return to time and again? You get the benefit of getting away while also going someplace that is both comfortable and familiar. There is a charitable gift strategy that works the same way. It's called a charitable gift annuity and it gives you the vacation of a lifetime.

When you fund a charitable gift annuity with us, we agree to pay you at a fixed, reliable rate for as long as you live. The rates are based on your age at the time of funding and will never change, no matter what the economy does. A gift annuity gives you:

- Fixed lifetime payments
- An income tax deduction for a portion of the funding amount
- Possible tax-free income

Want to upgrade your gift annuity? Fund it by transferring appreciated assets, like stock. You get the standard income tax deduction but also add capital gains benefits.

We can give you a no-obligation illustration that shows you exactly what your payments and tax benefits would be. You can fund a gift annuity for one person or two (such as husband and wife). After you make a gift to fund a charitable gift annuity, the payments will feel like a **vacation** -

providing you with peace of mind and a sense of comfort.

For more information and our step-by-step estate planning guide please give us a call at [718-965-7375 x1616](tel:718-965-7375) or reply to this e-mail. To help ensure your will and estate plan reflects your desires, you may also view some helpful videos on our planned giving website – www.cfbqlegacy.org.

This information is educational in nature. It is not offering professional tax, legal, or accounting advice. For specific advice about the effect of any planning concept on your tax or financial situation or with your estate, please consult a qualified professional advisor.



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PERSONAL PLANNER

[How to Give Property to Children](#)

Parents have a number of reasons for making gifts to children. First, a parent should have sufficient resources for retirement and for long-term care needs before making substantial gifts.

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SAVVY LIVING

[How to Get COVID Funeral Assistance Funds](#)

I lost my 78-year-old parent to COVID-19 in 2021 and want to find out if I am still eligible for the government funeral assistance program. What can you tell me about this?

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After working for decades as a pediatrician in a small town, Patricia is ready to retire.

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WASHINGTON NEWS

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In IR-2022-127, the Internal Revenue Service announced it is expanding its voice bot options. The new service is focused on taxpayers who would like to set up or modify a payment plan.

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FREE ESTATE PLANNING GUIDE

It's never too late to plan for the people and causes you care about. Our easy-to-use estate planning guide can help you gather the information you need before meeting with your attorney.



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PLANNED GIVING CALCULATORS

Use our online calculator to view the tax and income benefits of making a gift to support our cause. This can help you determine the best plan to meet your needs and goals.



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