



Wednesday, January 18, 2023

It is always nice to receive a gift, but what if you receive one knowing that gift will repeat for as long as you live? A charitable gift annuity gives you that benefit for life.

When you fund a charitable gift annuity, you receive payments from us for as long as you live. The payments are at a favorable fixed rate based on your age and will never change no matter how long you live or what the economy does. The favorable rates can be even higher if you choose to delay the first payment.

When you fund a charitable gift annuity, you also receive an income tax deduction this year for part of the funding amount. You may also receive capital gains benefits if you transfer the appreciated stock directly to us to create the charitable gift annuity. You can fund a charitable gift annuity for yourself or you and your spouse. There are other options as well. Call or email us to learn what your exact rate and tax savings will be.

For more information and our step-by-step estate planning guide please give us a call at [718-965-7375](tel:718-965-7375) x1616 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

[Income for Surviving Spouse](#)

Elliot and Alexis were concerned about planning for the future. They had built a substantial estate of \$1,200,000. When Elliot was 70, he rolled over his \$400,000 qualified retirement plan into an IRA. Because he is now over age 72, Elliot is taking...

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SAVVY LIVING

[Employment Effects on Social Security Benefits](#)

I started receiving Social Security retirement benefits in 2021 when I retired earlier than anticipated. I am now interested in going back to work part-time. Will returning to work affect my benefits and if so, how much?

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DONOR STORY

[Tax-Free Sale](#)

Howard and Lynn were both age 55 when they purchased some vacant land a few miles outside of town. They thought real estate would be a good investment that could be sold later for a profit.

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WASHINGTON NEWS

[2023 Tax Filing Season Opens on January 23](#)

In IR-2023-5, the Internal Revenue Service (IRS) announced that the tax-filing season will open on Monday, January 23, 2023. The IRS expects more than 168 million individual tax returns this year. Most taxpayers will file before the April 18 tax deadline....

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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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