



*Wednesday, March 8, 2023*

### **Spring for Your Checkbook**

Just as spring brings new life, each gift annuity payment gives you a little boost in your bank account. Your checkbook blooms a little more. Because the payments are fixed, they are as reliable as spring sunshine, and a welcome relief from life's other unpredictable moments. The payments and benefits continue for as long as you live, no matter what the economy does.

With your charitable gift annuity, you receive:

- Favorable fixed payments
- Income tax benefits
- Possible capital gains benefits

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](http://www.cfbqlegacy.org).

**Theme of the Month: Why Planned Giving?** Making a planned gift is a win-win for you the donor and your favorite non-profit(s). You have the opportunity to leave significant amounts to your favorite causes and give your heirs a tax break. Planned giving provides more power over

how your gift is used by adding requirements for its use while leaving an impactful legacy.

*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.*



[Endowments](#)



[How to Give](#)



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## PERSONAL PLANNER

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### [Irrevocable Life Insurance Trust \(ILIT\)](#)

Susan and Steve have been talking to their tax attorney, Elizabeth, about plans for their family. Susan is very concerned about their family.

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## SAVVY LIVING

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### [How to Spot Signs of a Thyroid Problem](#)

I have had several health issues over the past few years. Someone recently suggested that my thyroid might be causing some of my health problems. What are some common symptoms of thyroid dysfunction?

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## DONOR STORY

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### [Flexible Deferred Gift Annuity](#)

Luis is a 54-year-old executive at a large healthcare company. He purchased company stock during years when the stock price was low, and now the stock has grown substantially in value.

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## WASHINGTON NEWS

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### [IRS Reminder to Report All Income](#)

On March 1, 2023, the Internal Revenue Service (IRS) published a reminder to taxpayers that all income must be reported. This will include income from the gig economy, service industry income tips, any purchase, sale or exchange of digital assets, income from...

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## FINANCES

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[Zoom Posts Earnings](#)

[Treasury Yields Vary](#)

[Mortgage Rates Rise Again](#)

Thank you for your interest in planned giving. To access any of our resources, please go to our [website](#).

## 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.

[Download Guide »](#)

## 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.

[View Calculators »](#)

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