

Charitable Gift Annuity

You may be tired of living at the mercy of the fluctuating stock and real estate markets. A charitable gift annuity is a gift made to Lakeside Lutheran High School that can provide you with a secure source of fixed payments for life.

Benefits of a charitable gift annuity

- Receive fixed payments to you or another annuitant you designate for life
- Receive a charitable income tax deduction for the charitable gift portion of the annuity
- Benefit from payments that may be partially tax-free
- Further the charitable work of Lakeside Lutheran High School

How a charitable gift annuity works

1. You transfer cash or property to Lakeside Lutheran High School.
2. In exchange, we promise to pay fixed payments to you for life. The payment can be quite high depending on your age, and a portion of each payment may even be tax-free.
3. You will receive a charitable income tax deduction for the gift portion of the annuity.
4. You also receive satisfaction, knowing that you will be helping further our mission.

If you decide to fund your gift annuity with cash, a significant portion of the annuity payment will be tax-free. You may also make a gift of appreciated securities to fund a gift annuity and avoid a portion of the capital gains tax. Please contact me to inquire about other assets that you might be able to use to fund a charitable gift annuity.

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Lakeside Development Director

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Please consult with your tax or financial advisor to determine the best charitable giving strategies before you make any changes to your existing plan.