

Facts About the Salesian Annuity Plan...

THE SALESIAN ANNUITY PLAN allows you to give generously now while providing for your own future.

HOW?

A Salesian Annuity is a gift of money or securities to Salesian Missions in return for a **FIXED** annual income for the rest of your life. Hence, it is a gift and an investment.

FIXED, IN WHAT WAY?

Your income return will be the same year after year for as long as you live.

COULD I MAKE A BETTER INVESTMENT?

We think not. The gift annuity is given because people believe in the good work Salesian Missions is doing. Helping poor and needy children is an investment, the rewards for which are unbeatable.

IS IT A SAFE INVESTMENT?

Have no fear. Salesian Missions is totally responsible in keeping the terms of the annuity agreement. The Salesian Society is chartered and incorporated by the State of New York and the Annuity Plan is governed by New York State insurance laws. The Salesians have been working in the Archdiocese of New York since before the beginning of the century.

WHAT ARE THE TAX BENEFITS?

For the year you enter the agreement, you may claim a charitable income tax deduction on part of the gift annuity. In addition, a sizable part of your annual annuity income is also not taxable.

CAN YOU GIVE ME A GOOD EXAMPLE OF AN ANNUITY SITUATION?

Let's suppose that you are 70 years of age, and your

Salesian gift annuity is \$10,000.00. You will receive 6.7% interest rate (i.e. \$670.00) per year for the rest of your life. The current Charitable Midterm Federal rate would result in a tax deduction of about 36% of the annuity gift (i.e. \$3,621.80) and of the \$670.00 you receive each year, \$404.01 would be tax free.

WHAT ABOUT JOINT ANNUITIES?

A husband and wife can arrange for a joint annuity. It may also be arranged for a friend or relative. The same conditions would apply. In the case of a joint annuity, the rate of payment is lower, but payments continue after the death of one of the parties for as long as the survivor lives.

ARE THERE ANY OTHER BENEFITS?

One of the greatest satisfactions you will experience will be in knowing that your investment will assist poor people in over 125 countries around the world. Many needy children and their families, thanks to you, will live better and more decent lives.

HOW CAN I RECEIVE MORE INFORMATION?

For specific information regarding a Salesian Annuity, [fill in and return the form on the back](#). All information that you submit will be kept in complete confidence.

THE SALESIAN ANNUITY PLAN WILL BRING YOU...

- Fixed income for life
- Income tax advantages
- An opportunity to share your blessings with the needy



“I Never Realized I Could Have Income For Life... And Help Poor Children, Too!”

But then I talked to Salesian Missions... and they showed me how!

Income for life? I used to think it was only a dream, but then the Salesians told me about their investment/charity program called the Salesian Annuity Plan.

It's so simple. All you have to do is invest \$5,000 or more in a Salesian Annuity.

In return, the Salesians send me a check on a regular basis for as long as I live – absolutely guaranteed!

And because my original gift and their remittance checks are both tax-deductible in part, this has given me more money and more security than I thought possible.

Shouldn't you look into it, too?

READ ON FOR MORE INFORMATION...



THE SALESIAN ANNUITY PLAN

YES, show me how! Please send me more information about returns on a gift annuity and the tax deductions I would receive under your annuity plan.

Let me know about the special benefits of putting my appreciated stock holdings into your annuity plan.

AMOUNT OF GIFT CONSIDERED \$ _____
(THE MINIMUM AMOUNT FOR A GIFT ANNUITY IS \$5,000)

(Please Print Carefully)

NAME _____

ADDRESS _____ APT. # _____

CITY _____ STATE _____ ZIP _____

E-MAIL ADDRESS _____

DATE OF BIRTH: MONTH _____ DAY _____ YEAR _____

FOR JOINT ANNUITY ONLY:

NAME _____

DATE OF BIRTH: MONTH _____ DAY _____ YEAR _____

IMPORTANT: WE CANNOT SEND INFORMATION WITHOUT DATE OF BIRTH

PLEASE FILL IN, DETACH AND

RETURN THIS FORM TO:

SALESIAN MISSIONS • FINANCIAL PLANNING OFFICE

2 LEHEVRE LANE, PO BOX 30 • NEW ROCHELLE NY 10802-0030

TEL: (914) 633-8344 • WEBSITE: www.salesianmissions.org

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