



## Deferred Charitable Gift Annuity

Many donors who have sufficient current income from their employment or other sources would like to make a sizable charitable gift of capital now, but are concerned that on retirement they will need the income their capital earns. They would also like to reduce their current income taxes.

The deferred charitable gift annuity can be the answer. It provides retirement income and saves income taxes now --- and you make an important legacy gift to the American Academy of Neurology Foundation.

The deferred charitable gift annuity is simple.

You make a charitable gift to the AAN Foundation's Philanthropic Funds' Administrator now (before retirement) and you are paid a guaranteed life income starting at your retirement (or any other date you choose).

The advantages are:

- You have the satisfaction of making a significant charitable gift.
- Your charitable gift now (rather than after retirement) generates greater tax savings because you may be in a higher tax bracket, and so there are larger tax savings generated by your charitable gift.
- You receive your guaranteed annual payments at retirement, when your income will probably be lower than current income. Thus, you receive income when it is most needed, and when it may be taxed in lower income tax brackets.
- Part of each guaranteed payment will be tax-free.
- You rid yourself of management and investment worries.
- You can save estate taxes and probate costs.

Benefiting a family member is also possible. You can have a deferred payment gift annuity that will pay income to you for life (starting when you choose) and then to your spouse (or another designated individual) for life.

For more information, please contact:

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