

Peace of Mind Gift Annuity



Many years ago, Clara bought a home. Since she was very pleased with the home, she decided to buy stock in the company that built and sold her home. Over the years, the stock has increased in value many times.

Clara: This stock was a good investment. I have enjoyed my home and I thought if I like my home, other people would like theirs. Because I was a happy homeowner, I purchased the shares of stock in this homebuilder.



While the stock has gone up in value several times, I am now tired of guessing the market. In the last few years, the stock has gone up and down in value. I think it would be much better to have a good fixed return and not worry about the stock markets.

Clara called United Way and discovered that she could receive a return of almost 7% based upon her age. This fixed payment was in addition to a large income tax deduction. Clara decided to transfer \$10,000 of appreciated stock.

Clara: I am delighted with my gift annuity. I received 7% and saved over \$1,500 in income taxes. This plan has been great. Best of all, I no longer have to watch the markets go up and down. I now have peace of mind.

For more information on one of the following options please call or e-mail Gerry Taylor at United Way of Northeast Georgia 706-543-5254 or gerryktaylor@bellsouth.net.

1. You would like to receive a presentation of the plan for Clara
2. You would like a printed illustration of a gift annuity with your payout rate.
3. You would like to see your payout rate based on your age and value of your stock.