

Gifts that Provide Income to You and Others

Did you know that it is possible to make a gift for the eventual benefit of one or more charitable interests while first retaining income for you, your spouse, and/or other loved ones? In fact, you can choose from among a number of ways to give that feature income for life or other period of time you choose.

Through the use of these gift plans it can be possible to make gifts you may have never thought possible as a result of income, gift, and estate tax savings, tax-free asset growth, professional asset management, and other financial and estate planning benefits.

Many have found they can make significant gifts while enhancing their own or their loved ones' financial security. In fact, giving in this way can help a number of goals including:

- Increased spendable income from low-yielding stocks, bonds, or other assets.
- A welcome source of income to help cover expenses in pre-retirement years.
- Retirement income from sources that are permanently set apart from your other assets.
- Income for yourself, a spouse, or other loved ones in the future if needed.
- Assistance for parents or other loved ones in their later years.
- Providing funds to cover education or other expenses for children or grandchildren.

Exploring the Options

For more information, you may wish to explore one or more of the following options:

- [Charitable Gift Annuities](#) that feature generous fixed payments for life.
- [Charitable Remainder Trusts](#) that offer a choice of fixed income or income that can fluctuate with investment returns.

See questions & answers about [giving for income](#)

See advisor content about [giving through life income plans](#)

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