



The Catholic Foundation For The People Of The Diocese of Rockford

is an umbrella endowment trust fund established in 1987 by Bishop O'Neill. Parishes, schools and diocesan agencies may establish accounts with The Catholic Foundation.

We offer:

* Endowment accounts

- For gifts where principal (corpus) remains untouched for perpetuity, but allows for the distribution of earnings.

* Donor Advised Funds

- Establish an account now that can be distributed later
- Endowed (distribution of earnings only) or Provisional (distributions can include both earnings and the original gift)

* Charitable Gift Annuities

- Provide income now (learn more on the other side of this page)

Other ideas for planned gifts

- * Gifts of stocks or mutual funds
 - Can be directed to a parish, school, or to the diocese
 - Can be restricted or directed to a specific fund
- * IRA Assets
 - Required Minimum Distributions
- * Name your parish, school, or the diocese as the beneficiary of an existing account you already have established
- * Name your parish, school, or the diocese in your will or as a beneficiary of your trust

(Over for more information)

Now is the Time to Consider a Charitable Gift Annuity (CGA)



Did you know a CGA gives twice?

First to you – then to your parish, school or diocesan entity

- Lucrative Rates
- Your quarterly distributions are fixed (no economy or market fluctuations)
- Your gift annuity can be single life or joint life

CURRENT CGA RATES

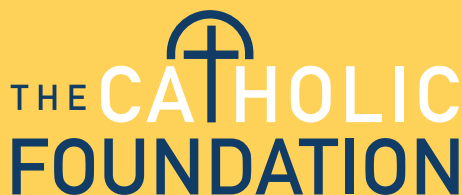
The single life rates, determined by the American Council on Gift Annuities, are as follows (for joint life rates, which are a bit lower, please contact us):

AGE	RATE	AGE	RATE	AGE	RATE	AGE	RATE
65	4.2%	72	4.9%	79	6.2%	86	7.8%
66	4.3	73	5.1	80	6.5	87	8.0
67	4.4	74	5.2	81	6.7	88	8.2
68	4.5	75	5.4	82	7.0	89	8.4
69	4.6	76	5.6	83	7.2	90+	8.6
70	4.7	77	5.8	84	7.4		
71	4.8	78	6.0	85	7.6		

minimum age 65; min. amount: \$5,000 ACGA rates effective July 1, 2020

WHAT IS A CHARITABLE GIFT ANNUITY?

A Charitable Gift Annuity (CGA) is a contract between you and the Catholic Foundation for the People of the Diocese of Rockford, in which you transfer ownership of cash, securities or other assets, and receive a guaranteed fixed payment for life. Upon your death, the remainder of your gift is distributed to your parish, school, or other diocesan agency.



For the People of the Diocese of Rockford