**Comerica Charitable Services Group**

**Helping in Extraordinary Ways**

**Life Income Opportunities**

**Within the Comerica Legacy Foundation**

**The Charitable Gift Annuity Contract**

“A Charitable Gift Annuity Contract is a gifting tool, that enables a donor to establish a charitable contribution that will generate an immediate charitable income tax deduction, plus provide an annuitized income stream for life!”

The Comerica Legacy Foundation enables this type of gifting strategy to happen with ease and more flexibility than ever before. It can be a most convenient way to make a real impact on the future!

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**Action Steps to create a Charitable Gift Annuity Contract within the Comerica Legacy Foundation**

Complete the form inside this brochure and custom illustrations will be prepared to demonstrate how your contract will function. *Remember*, the Comerica Legacy Foundation enables you to benefit multiple charities with just one contract and will also allow you to change the charities you have selected during your lifetime.

The goal of the Comerica Legacy Foundation is to help you make your impact on the Future.

Decide how you will fund your CCA Contract, (with cash or appreciated assets). The minimum amount is $10,000 per contract.

Decide if the income distributions are for One or Two Lives; as well as if you want Immediate or Deferred distributions. You can also decide if your distribution will be sent to you by check, or as an electronic deposit to your personal savings or checking account.

Finally, when you fund your contract, the Comerica Legacy Foundation will handle all of the administration responsibilities to insure that you receive your income distributions in a timely manner, (every contract is backed by the Comerica Legacy Foundation) and that the charitable Legacy you plan becomes a reality!

“We make a living by what we get, but we make a life by what we give…”

*Winston Churchill*
### Request for Charitable Gift Annuity Illustrations

**Name of Donor or Donors:**

_______________________________  __________________________________________

_______________________________  __________________________________________

**Address of Donor(s):**

_______________________________  Street

_______________________________  City

_______________________________  State & Zip Code

**Are the Donor(s) also the The Annuitants?**

Yes  ______

No  ______

If no, please list the name(s) of the Annuitant/Annuitants:

_______________________________  __________________________________________

**Annuitant(s) Date of Birth:**

[Minimum Age of 60 years old.]

_______________________________  __________________________________________

**Social Security Numbers of the Annuitant(s):**

_______________________________  __________________________________________

**The CGA Contract will be funded with:**

- Cash $________________________
- Appreciated Asset with a value of $________________________
- Cost Basis of $________________________

**CGA Distribution Frequency:**

- Quarterly  ________
- Annually  ________
- Semi-Annually  ________

**Current Income Tax Bracket:**

- 35% _____  33% _____
- 28% _____  25% _____
- 15% _____  10% _____

**Additional Comments/Information:**

_______________________________  __________________________________________

_______________________________  __________________________________________

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**Charitable Beneficiary/Beneficiaries:**

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**Note:** It is the policy of the Comerica Legacy Foundation and its affiliates to distribute 100% of the residual value outright to the above named charitable organizations, unless directed otherwise by you, the contractual donor.