



**Diocese of Des Moines**  
**Charitable Gift Annuity Luncheon**  
**Evaluation Form**

Date \_\_\_\_\_ Location \_\_\_\_\_

I felt the seminar was:

- Interesting and worthwhile  
 Interesting, but not applicable to me  
 Not of interest to me

What did you like about the seminar?

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What (if any) areas would you like to see improved in the seminar?

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Please check all of the following that apply:

- I am interested in making a Charitable Gift Annuity. Please contact me.

For a personalized Charitable Gift Annuity illustration, please supply the following:

- \_\_\_\_\_ The current value of the asset you are considering giving  
\_\_\_\_\_ The cost basis of the asset (if applicable)  
\_\_\_\_\_ Birth date of first beneficiary (MM-DD-YYYY)  
\_\_\_\_\_ Birth date of second beneficiary (MM-DD-YYYY)  
\_\_\_ / \_\_\_ Your combined top tax-bracket (i.e. 20% Federal, 5% State = 25%)

- I have additional questions and would like a private appointment to discuss my gift giving and/or my estate plan.
- I am interested in creating a Charitable Gift Annuity in the future. Please contact me \_\_\_\_\_ (month & year).

***All illustrations, meetings and services are offered at no cost or obligation as a service of the Diocese of Des Moines.***

Name (Mr./Mrs./Ms.) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_

Best Time to Contact    am / pm (circle one)    Email \_\_\_\_\_



## *Charitable Gift Annuity Charity Selection Form*

Select Percentage

- Endowment for the Church of Southwest Iowa
- Pastoral Center Foundation
- Priests' Medical Fund Foundation
- Priests' Pension Fund
- Seminary Fund Foundation
- Endowment for Educational Excellence
- Your Parish
- Your Catholic School
- Larry Breheny Endowment for Catholic Charities
- St. Joseph Emergency Family Shelter
- St. Mary Family Center
- Phoenix House (Council Bluffs)

## Sample Introductory Letter

October 19, 2011

Name  
Address  
City, State ZIP

Dear Name,

Thank you for considering hosting a Charitable Gift Annuity luncheon/dinner at your parish. As a complimentary service to each parish, Diocesan Gift Planning Consultant Nancy Stefani and I conduct the seminars to discuss charitable gift annuities and to answer other questions about wills and estate planning. These seminars have been found to be very successful and well received throughout the Diocese.

The format for these events is a simple luncheon or dinner, hosted by you and included personal invitations for up to 40 guests with maximum RSVP of 20 participants. This more intimate setting allows for a further discussion of specifics of charitable gift annuities and other planned giving mechanisms. If you have more than 20 respondents we will be happy to schedule an additional seminar to serve your needs.

Participants will spend time in prayer, fellowship, a presentation, as well as an extensive Q & A session. Total time is less than two hours. We will then follow-up with all participants as requested to ensure their questions are answered and they have the opportunity to make a gift to a parish, school, Diocese or Catholic charity.

Enclosed is a sample invitation, room setup guidelines, and sample gift annuity information. If you have any questions or would like to schedule a seminar, please do not hesitate to contact me by calling our office at 515-237-5079.

We look forward to serving you and your parish!

Sincerely,

Joan M. Bindel  
Development Director

Enclosures



*Sample profile for guests  
invited to attend  
Charitable Gift Annuity Luncheon*

This profile is provided as a guide for you to use in determining who will be invited to your upcoming Charitable Gift Annuity Luncheon. The luncheon is designed to be an intimate setting allowing participants to learn more about this specific opportunity to earn an income for life while making a gift to a Catholic entity. The number of invitees should not exceed 40 people and the number of attendees should be limited to no more than 20. If you get more than 20 responses we will be happy to split the group and conduct a second luncheon at a date to be determined.

This profile is not suggesting any one person or group is more important to the life of a parish community than another. It is simply assisting you in identifying those individuals or families who are most likely benefit from a Charitable Gift Annuity.

Criteria to consider include:

- Those age 60 or older
- Those with the capacity to make a single gift of \$5,000 or more
- Those available to attend a mid-week luncheon
- Those who have been generous with their philanthropy
- Those who have been actively involved in the parish as a volunteer or participant in parish life.

This criterion is established based on Diocesan gift acceptance policy that includes minimum ages for offering gift annuities and minimum funding levels for gift annuities. While many families may meet one of these criteria, the best possible invitees include those who have many of these traits.

Please remember, your personal invitation is important and your attendance is absolutely essential to the success of the event. Your invitation is meaningful and we appreciate your willingness to share this experience with the people of your community for the benefit of our parishes and our Diocese.

Thank you.



## *Charitable Gift Annuity Luncheon Room Set-Up Guide*

The room should have a media stand or table near the front of the room along with a podium and microphone. Please provide an LCD projector, screen and extension cord. The Diocese will provide the laptop. If you are unable to provide these three media items, please notify the Diocese and they will bring the items with them. The presenters will arrive 60 minutes in advance of the start time the day of the seminar to allow for set-up.

Seating should be adequate per RSVP's. Chairs and tables should be set-up for lunch/dinner when attendees arrive. Please make certain people have plenty of room to eat and take notes during the seminar.

Please provide two tables near the entrance to the room. The first should include name tags, pens, and small trash can for use by attendees. We will provide a handout to be given as people arrive. The second table will be used for supplemental materials for guests to pick up as they leave.

Lunch/Dinner should be provided free of charge by the parish. Please remember to include the pastor (1) and our presenter/staff (2) in your meal count.

Sample Invitation

Are you 60 years of age or older and would like to double or triple your retirement income?

Would you like 70 percent of that income to be tax free?

Would you like to receive an annual income check from your parish?

If you answered “yes” to any of the above questions...

Father Bob cordially invites you to be his special guest for dinner and discussion on

**Monday, November 14, 2011**

**6 – 8 p.m.** (Dinner served at 6:15 p.m.)

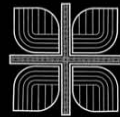
St. Francis of Assisi Catholic Church  
St. Clare Room  
7075 Ashworth Road, West Des Moines

*Topic:*

***“The Gifts that Increases Your Retirement Income”***

Presenters: Nancy L. Stefani, CFRE,  
Diocesan Gift Planning Consultant  
Joan Bindel, Diocesan Director of Development

Please RSVP to Monica at (515) 223-1111 or  
[mlihs@stfrancischurch.org](mailto:mlihs@stfrancischurch.org) by November 10.



# FIVE WAYS A GIFT ANNUITY CAN BENEFIT YOU!

Joan M. Bindel, Director of Development • Diocese of Des Moines, 601 Grand Avenue, Des Moines, IA 50309 • jbindel@dmdiocese.org • (515) 237-5079

**Attractive Rates.** Mr. and Mrs. Smith, both 83, are receiving a modest income from their certificate of deposit. When the CD matures in two months, they plan to obtain a Diocesan gift annuity and start receiving 6.9 percent. Gift annuity rates are very attractive for older friends of the Diocese.

**Tax-Free Payments.** Part of each annuity payment is tax-free. For example, Mrs. Jones, age 82, contributed a check for \$25,000 toward a charitable gift annuity. Each year, she will receive an annuity of \$1,875 (7.5 percent). Of this amount, \$1,444 will be excluded from income taxes. The tax-free portion of the annuity payment is considered "return of principal" and continues through the annuitant's estimate life expectancy.

**Income Tax Deduction.** Because a charitable gift annuity is partly a gift and partly an investment in an annuity contract, the donor

who itemizes is entitled to an income tax deduction for the gift portion of his or her annuity amount.

In the case of Mrs. Jones mentioned earlier, her \$25,000 gift annuity produced a charitable tax deduction of \$13,020.

**Fixed, Regular Payments.** It's nice to be able to count on a specific amount of payment no matter what happens to the financial markets. Your annuity payments will remain the same every year. And since gift annuity payments are backed by the full assets of the Diocese of Des Moines, you have assurance that your check will be in the mail or delivered personally for the rest of your life.

**Personal Satisfaction.** Perhaps the greatest benefit of a Diocesan Gift Annuity is the personal fulfillment you receive by helping the Diocese or your parish as well as yourself.



Joan M. Bindel, Director of Development

Many donors have taken advantage of this opportunity. They like the ease and simplicity of establishing a gift annuity. Others like the idea of reducing the size of their estate, thus lowering potential estate taxes.

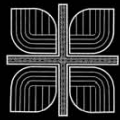
To find out more about how a charitable gift annuity can increase your retirement income, please return the attached slip to the Diocesan Development Office or call Joan Bindel today.

## PLEASE COMPLETE AND SUBMIT THIS FORM

*I am interested in learning more about receiving an income for life. Please contact me at:*

Name(s): \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_  
 State: \_\_\_\_\_  
 ZIP Code: \_\_\_\_\_  
 Phone Number: \_\_\_\_\_  
 E-mail Address: \_\_\_\_\_

**Forms can be mailed to:**  
**Diocese of Des Moines**  
**Development Office**  
**601 Grand Avenue**  
**Des Moines, IA 50309**  
**(515) 237-5079**



# DIOCESE OF DES MOINES

*"Some of the Best Investments are Made in Stocks, Bonds, and People."*

When you set up a Charitable Gift Annuity with the Diocese of Des Moines, you are contributing to an organization that is dedicated to serving the people of Southwest Iowa.

Please mail in the attached slip for more information, or contact Joan M. Bindel, Director of Development, at (515) 237-5079 or [jbindel@dmdiocese.org](mailto:jbindel@dmdiocese.org).

PLEASE COMPLETE AND SUBMIT THIS FORM  
*I am interested in learning more about gift annuities. Please send me an informational brochure:*

Name(s): \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_  
State: \_\_\_\_\_  
Zip Code: \_\_\_\_\_  
Phone Number: \_\_\_\_\_  
Email Address: \_\_\_\_\_

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