



IT'S A GRAND SLAM!

The words “grand slam” usually cause people to think of two things: the ultimate home run in baseball or breakfast at a Denny’s restaurant.

Both experiences are sure to put a smile on your face. They are almost too good to be true.

When it comes to supporting Sacred Heart Southern Missions, there is a gift opportunity that is also almost too good to be true: the charitable gift annuity.

When people learn the basics of a gift annuity, some wonder how such a gift could be possible. In essence, they wonder how it could be possible for someone to benefit financially while also helping a charity they love. They think there must be some “fine print.”

Actually, there isn’t any fine print.

Creating a gift annuity is quite straight-forward – hundreds and hundreds of Sacred Heart Southern Missions’ friends have already done so. Through a gift annuity, a person receives an income stream they know they can count on. You can also count on the fact that the poor who are helped by our Southern Missions’ programs will receive a kind and caring helping hand, giving these people a chance they never thought would come their way. A gift annuity really is a win-win opportunity.

Here are the basics of a gift annuity:

1. You make an irrevocable gift to Sacred Heart Southern Missions of \$1,000 or more;
2. You designate a beneficiary (they must be 60 or older) which is the person who will receive the payments. It can be you and/or someone you care about;
3. In return, the beneficiary(ies) receives payments at a fixed rate for life. The payments are based on the age of the beneficiary(ies);
4. A portion of the payments is tax-free, and you receive a charitable deduction as well.

It really is that straight-forward.

Without question, we are living in a time of great uncertainty. Interest rates are unpredictable and the stock market is on a roller-coaster ride. We wonder what financial tools we can rely on. With our 40 year history of uninterrupted payments a Sacred Heart Southern Missions charitable gift annuity is something that can be counted on.

Got some questions? Please call Steve Koepke in our Donor Relations office 888-217-4829 or email at stevek@shsm.org to learn the rate that applies to your age and to request an illustration tailored to your needs. There is absolutely no obligation.