

## How a charitable gift annuity benefits you—and Temple

- Increase retirement income with generous lifetime annuity payments.
- Protect yourself from stock market volatility.
- Receive tax-free income in most cases.
- Minimize capital gains taxes on annuities funded with appreciated stock and mutual funds.
- Replace low interest rate CDs with a gift annuity with a higher payout.
- Receive an income tax charitable deduction for a portion of the gift amount in the year you make the gift.
- Make a gift to Temple that gives back to you.



## Acres of Diamonds Circle

The Acres of Diamonds Circle celebrates the commitment of forward-thinking alumni, faculty, staff and friends of Temple University who have provided for the future of the University in their estate plans through wills, trusts, retirement plan designations, or by establishing life income gifts that ultimately will benefit Temple. Establishing a charitable gift annuity qualifies you for membership in this prestigious recognition group.

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DIVISION OF THEATER, FILM  
AND MEDIA ARTS

This publication provides general gift, estate, and financial planning information. Temple University does not provide legal or tax advice. Please consult your legal and/or other professional advisors when considering this type of gift.



Temple University  
Charitable Gift Annuities  
to Benefit the Division of  
Theater, Film and Media Arts





Dear Temple Theater, Film and Media Arts Alumni,

Temple's hallmark programs in theater, film, and media arts engage gifted students with nationally and internationally recognized faculty scholars and professionals. Together they fuse the highest quality professional training with rigorous scholarship and consummate artistry to forge a passionate, diverse creative learning community dedicated to making a difference through applied artistry.

TFMA alumni and friends play a pivotal role in enhancing the quality of the educational experience at Temple. A charitable gift annuity enables you to provide for your own financial security while ensuring the Division's long-term success—and the success of our students. We are appreciative of your consideration to establish a charitable gift annuity to benefit Temple's creative students.

Please contact us with any questions.

Robert T. Stroker

Dean and Vice Provost for the Arts

### **How a charitable gift annuity works**

Charitable gift annuities are the most popular life income gift for alumni and friends who wish to ensure their financial future, and the future of the Temple School of Theater, Film, and Media Arts. In exchange for your irrevocable gift of cash or appreciated securities, Temple will pay one or two people you designate fixed payments for life. Typically, you name yourself and one other person, often a spouse, to receive quarterly annuity payments. However, you can designate others to receive the payments if you wish. All annuitants must be age 60 before payments can begin. If you are younger than 60, you can fund the annuity now and defer the payments to a future date of your choosing. Payments are backed by the unrestricted assets of the University. After the passing of the annuitants, the remainder of your gift will be used to support TFMA. The minimum gift required is \$10,000.

### **Retirement planning with flexible-start-date gift annuities**

Many alumni and friends use Temple charitable gift annuities as a means to provide an additional source of reliable income in retirement, while achieving their philanthropic objectives for Temple. If you are not sure when you want your payments to begin you can fund a flexible-start-date annuity and decide in the future when the annuity payments should begin. The longer you defer the start of payments, the higher your annuity payment will be.

### **Next steps**

- Contact Temple's Office of Gift Planning for a personalized illustration.
- Ask Gift Planning staff which type of gift annuity might be right for you.
- Share your personalized illustration with your financial advisor.
- Complete a gift annuity application from Temple's Office of Gift Planning.

### **Funding your gift annuity**

- Mail your gift annuity application along with your check, payable to Temple University, to the Office of Gift Planning.
- Contact the Office of Gift Planning for transfer information if you are funding your gift annuity with appreciated securities.

We welcome the opportunity to answer questions and assist you.

