



Building on Higher Ground

# Life Income Plans

*A gift to others – payments for you*

It seems almost too good to be true, but that is exactly what a life income plan from The Fuller Center through Mennonite Foundation does. You give a gift to charity then receive payments for the rest of your life.

## How it works

A life income plan from The Fuller Center through Mennonite Foundation allows you to make a gift to charity and get income from the assets you donate. How do we do it? We invest the proceeds from your gift as long as you are living. The income from that investment is paid to you. After your death, the balance goes to The Fuller Center and other approved charities based on your recommendations. A modest annual service charge, generally from earnings, helps cover administrative costs.

## How to give a gift

Establishing a life income plan for The Fuller Center through Mennonite Foundation is easy. One of our trained professional representatives can help you select the plan that best fits your needs. You simply make the donation, and we take care of the rest.

We offer a variety of life income plans listed in the chart on the reverse side.

## Unique features

**Gift Annuity** – A portion of the annuity payment is tax-free income.

**Deferred Gift Annuity** – You make a gift now and get an income tax

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## Advantages

- Receive lifetime payments.
  - Grants tax savings.
  - Fund with cash, securities, or real estate.
  - Provide for loved ones.
  - Support your favorite charities.
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deduction, but annuity payments are deferred until a later date at a higher rate.

**Annuity Trust** – The amount of your payment remains the same for life based on the donor's age and projected earnings of the trust.

**Unitrust** – Trust assets are revalued annually. The payment is based on the most recent valuation.

**Pooled Income Fund I** – A trust somewhat like a mutual fund. Your gift and the gifts of others are invested in long-term securities so the income is very stable.

**Pooled Income Fund II** – A trust similar to a money market fund. Investments are in short-term securities so earnings fluctuate with changes in interest rates.

## What The Fuller Center receives

We are delighted to receive funds through a life income plan. A life income plan ensures that we receive the part of your gift which is left after your death.

The Fuller Center for Housing  
Kirk Lynn-Barnes  
701 S. Martin Luther King Blvd.  
Americus, GA 31710-2257  
(229) 624-2800  
kirk@fullercenter.org

Mennonite Foundation  
Joseph Lapp  
625 Mount Clinton Pike, Suite A  
Harrisonburg, VA 22802  
(800) 442-7630  
joseph.lapp@mnfounders.org