



A Charitable Gift Annuity Solutions™ Program

Magnify your goal

Program Details*

The [Charitable Gift Annuity Solutions™ Program](#) is a program dedicated to serving nonprofits of all sizes and in all phases of planned giving. Whether you already have an established CGA program or you are a nonprofit thinking about dipping your toe into the planned giving arena, this program is for you! * This program excludes the State of Illinois. Please [see the State of Illinois Program Details Form](#) for specific details.

Through a strategic partnership of some of the nation's top planned giving expert groups, [Charitable Giving Resource Center](#) can now offer your nonprofit a turnkey charitable gift annuity program in accordance with the American Council on Gift Annuities standards. This program includes foundational forms and marketing materials, such as donor letter templates, ad templates, articles for publication, general CGA PowerPoint presentations to use in educating donors and communities, a Public Foundation that will "house" your CGAs, full administration and tax reporting, CGA illustrations powered by [Crescendo Interactive](#) (if needed), full-service investment and management of the funds and ongoing CGA Pool updates.

Program Partners

[Charitable Giving Resource Center \(CGRC\)](#) A resource center and consultant for nonprofits, CGRC will coordinate and manage the turnkey program for nonprofits. CGRC is a subsidiary of Values Based Holding Corporation.

[National Gift Annuity Foundation \(NGAF\)](#) Founded in 2003, NGAF provides nonprofits with a 501(c)(3) umbrella for hosting your CGAs and the liability for all CGA fund management and payments to donors.

[Charitable Trust Administration Company \(CTAC\)](#) Founded in 1995, CTAC offers administration services for the philanthropic endeavors of nonprofits and their donors, currently including the administration of over 5,000 CGAs.

[Sherpa Investment Management](#) A fee-only Registered Investment Adviser, Sherpa utilizes an investment portfolio approach in alignment with actuarial rates established by the American Council on Gift Annuities at a very low cost. Sherpa is a subsidiary of Values Based Holding Corporation.

Program Fees

The total fees for the Charitable Gift Annuity Solutions™ Program are listed below. The fee includes the following: CGA administration (donor payments, accounting), CGA pool investment management, and marketing support (including illustrations). There are two options outlined below and with either option **100% of the residuum comes back to the nonprofit** at the death of the annuitant(s).

Option 1 – 3% is deducted from each CGA contract upfront plus the 1.79%* annual fee.

Option 2 – 0% upfront with an additional 0.50% fee for a total of 2.29%* annual fee.

*These figures are subject to change due to portfolio structure changes.

Charitable Gift Annuity Requirements

Minimum Size:	\$20,000	Maximum Size:	\$250,000 (with exceptions for larger donations)
Minimum Age:	55	Annuity Options:	Immediate, Deferred and Flexible Deferred
Assets Accepted:	Cash, Publicly Traded Securities, and Illiquid Assets (<i>upon approval</i>)		

Program Contact Information

Sue McEntee, Chief Operating Officer
(515) 277-4050 or toll-free at (888) 925-6555
cga@MagnifyYourImpact.com


CHARITABLE GIVING
Resource Center
Magnify your impact



A Charitable Gift Annuity Solutions™ Program

Magnify your goal

Program Details for the **State of Illinois**

The [Charitable Gift Annuity Solutions™ Program](#) is a program dedicated to serving nonprofits of all sizes and in all phases of planned giving. Whether you already have an established CGA program or you are a nonprofit thinking about dipping your toe into the planned giving arena, this program is for you!

Through a strategic partnership of some of the nation's top planned giving expert groups, [Charitable Giving Resource Center](#) can now offer your nonprofit a turnkey charitable gift annuity program in accordance with the American Council on Gift Annuities standards. This program includes foundational forms and marketing materials, such as donor letter templates, ad templates, articles for publication, general CGA PowerPoint presentations to use in educating donors and communities, a Public Foundation that will "house" your CGAs, full administration and tax reporting, CGA illustrations powered by [Crescendo Interactive](#) (if needed), full-service investment and management of the funds and ongoing CGA Pool updates.

Program Partners

[Charitable Giving Resource Center \(CGRC\)](#) A resource center and consultant for nonprofits, CGRC will coordinate and manage the turnkey program for nonprofits. CGRC is a subsidiary of Values Based Holding Corporation.

[National Gift Annuity Foundation \(NGAF\)](#) Founded in 2003, NGAF provides nonprofits with a 501(c)(3) umbrella for hosting your CGAs and the liability for all CGA fund management and payments to donors.

[Charitable Trust Administration Company \(CTAC\)](#) Founded in 1995, CTAC offers administration services for the philanthropic endeavors of nonprofits and their donors, currently including the administration of over 5,000 CGAs.

[Sherpa Investment Management](#) A fee-only Registered Investment Adviser, Sherpa utilizes an investment portfolio approach in alignment with actuarial rates established by the American Council on Gift Annuities at a very low cost. Sherpa is a subsidiary of Values Based Holding Corporation.

Program Fees

In alignment with the State of Illinois rules and regulations, all Illinois charitable gift annuities will be reinsured until January of 2023. Nonprofits wishing to bring CGA's to this program via Illinois will have two options:

Option 1: After reinsurance costs, receive the remainder of the gift upfront.

Option 2: After reinsurance costs, leave the remainder of the gift in an investment pool and receive 100% of the value of the remainder, including interest, at the time of the death of your donor.

Charitable Gift Annuity Requirements

Minimum Size:	\$20,000	Maximum Size:	\$250,000 (with exceptions for larger donations)
Minimum Age:	55	Annuity Options:	Immediate, Deferred and Flexible Deferred
Assets Accepted:	Cash, Publicly Traded Securities, and Illiquid Assets (<i>upon approval</i>)		

Program Contact Information

Sue McEntee, Chief Operating Officer
(515) 277-4050 or toll-free at (888) 925-6555
cga@MagnifyYourImpact.com

