



**Willowbrook  
United Methodist Church**  
19390 N. 99<sup>th</sup> Avenue  
Sun City, AZ 85373-1102

ATTIX  
POSTAGE  
BEFORE  
MAILING

**Q: Can I see a free, individualized Benefit Report without obligation?**

**A: YES!**

Provide the information requested on the brochure's form. The information will be used to produce an individualized, Benefits Report that will detail the amount of your income tax deduction, your payout rate, your annual income and how much of the annual income will be tax-free. The report is easy to understand and there is no obligation expected in return for producing this free report.

To receive your free report, provide the information requested on the brochure's form and return the form to any member of the Willowbrook Foundation.

**RATES**

SINGLE LIFE		TWO-LIVES	
Age	Rate	Age	Rate
65	6.7	65 & 65	6.3
68	7.0	68 & 68	6.5
70	7.2	70 & 70	6.6
73	7.6	73 & 73	6.8
75	7.9	75 & 75	7.0
80	8.9	80 & 80	7.7
85	10.4	85 & 85	8.7

**Willowbrook  
United Methodist Church**  
19390 N. 99<sup>th</sup> Ave.  
Sun City, AZ 85373  
623-974-5637

**Willowbrook  
FOUNDATION  
of  
Sun City**

**Charitable  
Gift  
Annuity**

**HIGH RETURN**

**(NO WORRY)**

**Get a Higher Rate of Return on Your Investments with a Willowbrook Foundation Gift Annuity**

**Why Should You Consider a Charitable Gift Annuity?**

CDs and Treasuries are paying dismal returns. The stock market has been flat or down for two years which only adds to uncertainty and diminishing returns for many.

A Gift Annuity not only offers some of the best rates in the market, but also is a safe and secure way to increase your income. Additionally, a Gift Annuity provides you an opportunity to support the Willowbrook Foundation of Sun City.

**How Does It Work?**

1. You donate a minimum of \$5,000 to the Desert Southwest United Methodist Foundation (DSUMF), our managing partner in these gifts.
2. In exchange, the DSUMF will guarantee a fixed, quarterly annuity payment to you and/or your spouse for life.
3. After life, Willowbrook Foundation will receive 88% of the funds remaining in your annuity account; DSUMF will receive 12% in order to offset its management costs during your lifetime.

**EXAMPLE:**

In February of 2002, Mr. Bell, age 77, donates \$20,000 in appreciated stock to Willowbrook Foundation for a one-life gift annuity. The stock's cost basis is \$5,000. The Foundation's annuity rate for a 77 year old is 8.2%. Thus, Mr. Bell's fixed annual annuity is \$1,640 of which \$259 is tax-free income. Mr. Bell can receive his annuity in quarterly payments. Also, if Mr. Bell itemizes on his tax return, he qualifies for an income tax deduction of \$6,493 for this gift.

In February of 2002, Mr. & Mrs. Smith, ages 79 & 80 donate \$20,000 in cash for a two-life gift annuity. Their annuity rate is 7.6%, thus their fixed annual annuity is \$1520 of which \$959 is tax free. In addition, if the Smiths itemize on their tax return, they qualify for an income tax deduction of \$7,430.

**PLEASE REMEMBER, THESE GIFTS ARE BOTH DATE AND AGE SENSITIVE; YOUR RESULTS WILL VARY!**

**BENEFITS:**

1. **Increased, Guaranteed, Lifetime Income!**
2. **Immediate Tax Benefits:**
  - A. Deductions
  - B. Tax-Free Income!
3. **Future Support For Your Church!**

PLEASE PRINT!

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY, STATE, ZIP: \_\_\_\_\_

CHECK A BOX:  ONE-LIFE GIFT ANNUITY  TWO-LIFE GIFT ANNUITY

TYPE OF GIFT:  CASH: Amount \$ \_\_\_\_\_ Stock Symbol: \_\_\_\_\_  
 STOCK: # of Shares: \_\_\_\_\_ Cost Basis: \$ \_\_\_\_\_  
 Fair Market Value: \$ \_\_\_\_\_

1ST ANNUITANT'S BIRTHDATE: Month: \_\_\_\_\_ Day: \_\_\_\_\_ Year: \_\_\_\_\_  
 2ND ANNUITANT'S BIRTHDATE: Month: \_\_\_\_\_ Day: \_\_\_\_\_ Year: \_\_\_\_\_

Provide the information requested below; detach at the dotted line above and mail or give to a representative of Willowbrook Foundation.