

BOSTON BAROQUE

Martin Pearlman, Music Director

LIFE INCOME PLANS

Life Income Plans are opportunities that offer income and tax advantages during your lifetime. Your financial and/or tax advisor will know which option is best for you.

Charitable Gift Annuity

A Charitable Gift Annuity is a contract between you and Boston Baroque, by which you make a donation of \$10,000 or more and Boston Baroque agrees to pay you a fixed payment for life. The payment amount is based on your age and the size of your gift. At the end of the contract remaining assets will go to Boston Baroque. Benefits include an immediate tax deduction and preferential taxation of the annual income.

Charitable Remainder Trust

A Charitable Remainder Trust is a legal document that is typically funded with assets \$200,000 or greater. The trust provides an income stream for you and your beneficiaries, with the remainder of the donated assets going to Boston Baroque at the expiration of the agreement. Benefits include an immediate tax deduction, preferential taxation of the annual income, and control over the management of assets.

For more information on Boston Baroque's Planned Giving opportunities, please contact Director of Development C.C. Cave at 617.987.8600 x118.