

Pooled Income Fund



Increase Your
Income While
Supporting
Our Cause

Mount 
Saint Mary's
University
LOS ANGELES

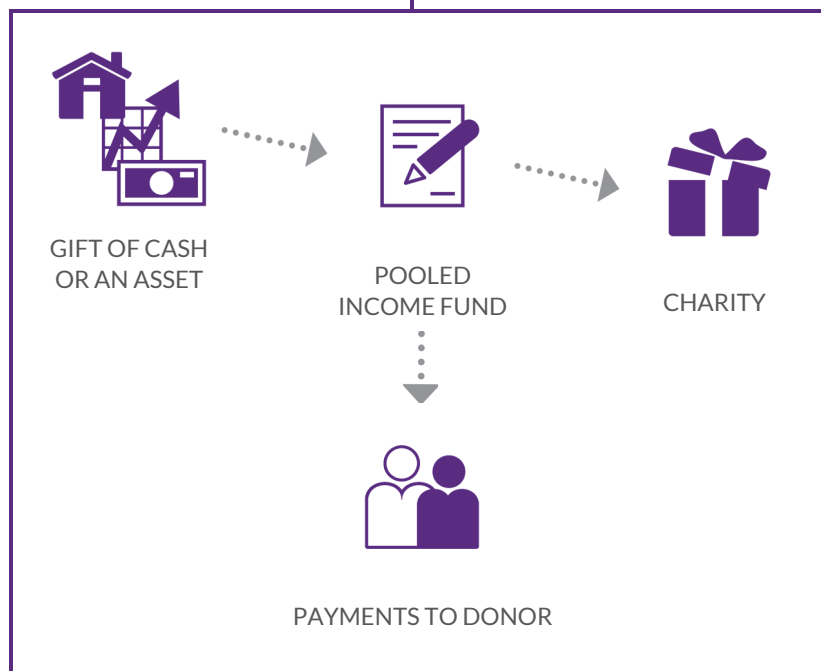
100
UNSTOPPABLE
YEARS

Are you seeking more income? Would you like to support the causes that matter most to you? Consider the benefits of making a charitable gift to our pooled income fund!

What is a Pooled Income Fund?

A pooled income fund is a separate charitable trust fund that we manage. When you contribute to our pooled income fund, you receive immediate tax and income benefits. Our pooled income fund works like this:

- Your contributions are pooled with those of other donors and invested in our fund.
- Income will be paid to you quarterly based on your interest in the fund.
- When you pass away, any remaining funds will go to help further our mission.



What Are the Advantages of a Pooled Income Fund?

"The pooled income fund provides us with additional income for our retirement and an 'upside potential' for the income to grow . . . all without the costs and complexities of a trust. Plus, we get to support our favorite charitable cause with a legacy gift!"

- **Simplicity.** Contributing cash or other assets to our pooled income fund is easy. You complete a simple agreement, and there are no set-up fees.
- **Low initial contribution.** The contribution minimum for our fund is lower than other charitable income arrangements. Check with us to see if your gift qualifies.
- **Lifetime payments.** You will receive income for life. If you are married, you can also add your spouse as a beneficiary.
- **Tax savings.** You benefit from a charitable income tax deduction for your gift.
- **Avoidance of capital gains tax.** If you gift an appreciated asset, you avoid tax that would otherwise be due if you sold the asset.
- **Leaving a legacy.** You can leave a lasting legacy gift to further our work.



What Kind of Returns Can You Expect?

Pooled income fund returns vary depending on the fund performance. Please contact us for a free illustration with your potential payment and tax savings.

Definitions

Pooled Income Fund

A separate charitable trust fund that a qualified charity manages. When you contribute to a pooled income fund, you receive immediate tax and income benefits. Contributions are pooled with those of other donors and invested in a fund. Income will be paid to you quarterly based on your interest in the fund. When you pass away, any remaining funds will go to help further our mission.



Let Us Help You

We would be pleased to work with you and your advisor to discuss the benefits of a pooled income fund for you. If you would like to start the process or have questions about pooled income funds, please contact us.

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