

Will 2003 happen again this coming December?

That's the first thing that came to our minds when we looked at the just-announced new recommended yields for charitable gift annuities. The available yields for annuities established after New Year's Day in 2009 will be, on average, over half of a percent lower than what Wellesley currently offers. The last time a yield reduction happened was five years ago at the end of 2003. People queued up by the dozens in a rush to establish new gifts before the less-generous rates took effect. It created a tsunami of new gifts that resulted in Wellesley's gift total topping that of every college in the country that year.

Don't delay in asking for the numbers that would apply to you. Contact us for the details now before the inevitable crush in the fall. That way, you'll have ample time to plan ahead and lock in the better rate now.

Age	Current Wellesley Rates	Proposed New Wellesley Rates Effective 01/02/2009
60	6.0%	5.5%
61	6.0%	5.5%
62	6.1%	5.6%
63	6.1%	5.6%
64	6.2%	5.7%
65	6.3%	5.7%
66	6.3%	5.8%
67	6.4%	5.9%
68	6.5%	6.0%
69	6.6%	6.0%
70	6.7%	6.1%
71	6.8%	6.2%
72	6.9%	6.3%
73	7.0%	6.5%
74	7.2%	6.6%
75	7.3%	6.7%
76	7.5%	6.9%
77	7.6%	7.0%
78	7.8%	7.2%
79	8.0%	7.4%
80	8.3%	7.6%
81	8.5%	7.8%
82	8.8%	8.0%
83 AND OLDER	9.0%	8.0%

\$10,000 minimum gift. For beneficiaries younger than age 60: Contact the College for details.



OFFICE OF PLANNED GIVING
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