



Charitable Gift Annuity Form

UNIVERSITY OF MINNESOTA

The undersigned has made, or is intending to make, an irrevocable gift to the University of Minnesota Foundation for the purpose of establishing a charitable gift annuity to benefit the University of Minnesota. The following information will be used to prepare the gift annuity agreement and related documents. Within two weeks, the donor will receive a receipt and gift annuity agreement signed by an officer of the foundation along with information that may be used for tax reporting of this gift.

Donor information (please list both names if a joint gift is intended)

_____	_____	_____	_____	_____	_____	_____
FIRST	M.I.	LAST	FIRST	M.I.	LAST	
_____			_____		_____	_____
ADDRESS			CITY		STATE	ZIP
_____		_____	_____			
PHONE		FAX	EMAIL			

Annuitant information (person(s) who will receive income payments)

_____	_____	_____	_____	_____	_____
FIRST	M.I.	LAST	FIRST	M.I.	LAST
_____			_____		
DATE OF BIRTH			DATE OF BIRTH		
_____			_____		
RELATIONSHIP TO DONOR			RELATIONSHIP TO DONOR		

Type of annuity

Immediate payment, to begin with next payment cycle

Deferred payments, to begin in _____
MONTH/YEAR

Flexible deferred payments, with a target date of _____
MONTH/YEAR

Payment frequency (check one)

Monthly Quarterly Semi-annually Annually

I/we would like to receive (check one) (Note: does not apply when funding the gift annuity with an IRA QCD)

Most tax-free income Greatest tax deduction

Two-life annuity payment selection (two-life annuities only)

Joint and survivor—Income is paid to both beneficiaries while both are living, then the income is paid to the survivor for life, i.e., payments would be made in both names.

Successor—Income is paid to the first annuitant for life, and then to the second annuitant for life, if he or she survives the first annuitant.

Gift information

TYPE OF ASSET (CASH, STOCK, MUTUAL FUNDS, IRA QCD)

AMOUNT (CASH) OR ESTIMATED VALUE (SECURITIES)

DONOR'S COST BASIS (IF SECURITIES)

DONOR'S YEAR OF ACQUISITION (IF SECURITIES)

I/we will be making stock or mutual fund transfers that may be received by the foundation on different days.

If transferring stock or mutual fund shares, please indicate how the assets are owned: individually jointly

WA gift annuities (to be completed by the U of M Foundation):

The amount of the annuity to be paid to the transferor or the transferor's nominee: _____

The reasonable value as of the date of the agreement of the benefits created: _____ (This value may not exceed by more than fifteen percent the net single premium for the benefits, determined according to the standard of valuation set forth in RCW 48.38.020(3).)

Gift designation (person(s) who will receive income payments)

I/we direct that the following University of Minnesota campus(es), college(s), or program(s) be the beneficiary(ies) of the remaining assets of this gift annuity at its termination, either at the death of the annuitant/surviving annuitant or upon my/our relinquishment of the remaining income interest. I/we understand that the remaining value of this gift annuity at termination will be distributed in the manner directed and that this amount may be either more or less than the initial value of the gift.

Recognition preference (check one)

This gift entitles me/us to membership in the University of Minnesota Heritage Society. It also may qualify me/us for membership in another giving society of the Presidents Club, depending upon total irrevocable gifts to date. Please list my/our name(s) on University of Minnesota donor recognition rosters as shown:

I/we desire that this gift be **anonymous**. My/our name/names should not appear on any donor rosters.

Signature

DONOR

CO-DONOR (IF APPLICABLE)

DATE