REQUEST FOR GIFT ANNUITY PROPOSAL
(YOU MUST PRINT LEGIBLY!)

CHECK A BOX NEXT TO THE TYPE OF GIFT
FOR WHICH YOU ARE REQUESTING INFORMATION

❑ **FOOTSTEPS GIFT ANNUITY** ❑ **REGULAR CHARITABLE GIFT ANNUITY**

1. Donor's Name: _____
(First) (MI) (Last)

2. Date of Birth: _____ / _____ / _____ E-Mail Address: _____

3. Donor's Address: _____

City: _____ State: _____ Zip: _____

4. Donor's Tax Bracket: ❑ 10% ❑ 15% ❑ 25% ❑ 28% ❑ 33%

5. $ Amount of Intended Gift (Cash/Check): $ _____

If gift is other than cash, then what type of property will you use to fund your gift annuity?

6. Type of Security: ❑ Stock ❑ Bond ❑ Mutual Fund ❑ Real Estate (Check One)

Name/Symbol: _____; # of Shares: _____; Cost Basis: $ _____

Name/Symbol: _____; # of Shares: _____; Cost Basis: $ _____

Name/Symbol: _____; # of Shares: _____; Cost Basis: $ _____

The cost basis of your security is the amount paid when purchased. This information is needed to calculate how much of your gift annuity income will be taxed at the capital gain rate.

COMPLETE THIS FORM AND TURN IT IN TODAY!