

Personal Information**DONOR 1****DONOR 2**

LEGAL NAME

LEGAL NAME

ADDRESS

ADDRESS

CITY

STATE

ZIP

CITY

STATE

ZIP

EMAIL

EMAIL

DATE OF BIRTH

PHONE

DATE OF BIRTH

PHONE

Annuitant Information**The annuity will be payable to (choose one):**☐ One Annuitant ☐ Two Annuitants, then to the surviving Annuitant☐ One Annuitant, then to the surviving Annuitant**The Annuitant(s) is/are as follows (choose one):**☐ I/We are the Annuitant(s) ☐ The Annuitant(s) is/are as follows:**ANNUITANT 1****ANNUITANT 2**(If "One Annuitant, then surviving Annuitant" option
is selected, please note first Annuitant here)

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RELATIONSHIP TO DONOR

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We are required to obtain social security numbers for all annuitants. A member of the Gift Planning team will call you prior to setting up the annuity.

Contribution Information

I/We would like to contribute the following assets to our charitable gift annuity:

(May include cash or marketable securities. Please contact Office of Gift Planning if IRA assets chosen.)

Asset Type & Description	Date Purchased	Ownership	Cost Basis	Current Value*
Example: 100 shares of XYZ Corp	1/1/14	Donor 1	\$50,000	\$100,000
				\$
				\$
				\$
Total Value =				\$

* Note: Actual fair market value of securities for calculating amount of annuity and tax deduction will be determined when securities are received.

Annuity Information

I/We would like the following type of annuity:

- ☐ Immediate Payment Annuity
- ☐ Standard Deferred Payment — gift annuity with payments to start in _____.
(Payments must start at least one year after the date of the gift.)
- ☐ Flexible Deferred Payment — gift annuity with payments to start within the ten-year range
of _____ to _____.
The earliest date must be at least one year after the date of the gift.

Payment Information

**Annuity payments will be made quarterly on the last day of March, June, September and December.
Payments must be made by direct deposit to your financial institution. Please include voided check.**

Remainder Designation

I/We declare our wish that the remainder at the termination of the annuity be used for the following purpose:

- ☐ Unrestricted use by the College of the Holy Cross
- ☐ Designation as specified in a signed gift agreement with the College.

The availability of a charitable gift annuity is subject to applicable state laws and regulations. Please contact us for information regarding availability in your state.