

**Alabama-West Florida United Methodist Foundation, Inc.**

P. O. Box 8066

Dothan, AL 36304

Phone: 334-793-6820 -- Fax: 334-794-6480

**GIFT ANNUITY APPLICATION FORM**

I (we) hereby make application for a gift annuity subject to the following terms and conditions:

**Donor(s)** (Enter both names if property is jointly-owned or community property; otherwise enter one name)

Name _____	Name _____
Date of Birth _____ <input type="checkbox"/> Male <input type="checkbox"/> Female	Date of Birth _____ <input type="checkbox"/> Male <input type="checkbox"/> Female
SS# _____	SS# _____
Address _____	Address _____
City _____ State _____ ZIP _____	City _____ State _____ ZIP _____
Daytime phone _____	Daytime phone _____

**Contribution:** The following is funding the Gift Annuity:

- Check in the amount of \$ \_\_\_\_\_ (made payable to U.M. Foundation).
- Marketable securities (Attach letter of transfer, with cost basis. Fair market value determined when securities are received by the Foundation.)

**Annuitants:**

Check one:  One annuitant     Two annuitants ( Joint & Survivor **OR**  Successive Interests)

**\*\*If annuitant(s) is(are) other than the donor(s), complete the following:**

1 <sup>st</sup> Annuitant _____	2 <sup>nd</sup> Annuitant _____
Date of Birth _____ <input type="checkbox"/> Male <input type="checkbox"/> Female	Date of Birth _____ <input type="checkbox"/> Male <input type="checkbox"/> Female
SS# _____	SS# _____
Address _____	Address _____
City _____ State _____ ZIP _____	City _____ State _____ ZIP _____
Daytime phone _____	Daytime phone _____

**Annuity Payments:**

Will payment of the annuity be immediate or deferred?     Immediate     Deferred to begin \_\_\_\_\_ (date).

Payment frequency: Check one:  Annually     Semi-Annually     Quarterly

**Purpose:** The ultimate residual gift should be donated to:

Alabama –W.Florida United Methodist Foundation, Inc.                      ( \_\_\_\_\_ %) (Minimum of 10%)

\* \_\_\_\_\_    ( \_\_\_\_\_ %) U.M. Beneficiary or Church

\* Please indicate whether a Permanent Fund or a one-time immediate gift.

I have received the disclosure statement from the United Methodist Foundation regarding its gift annuity reserves and investments, as required under the Philanthropy Protection Act. I understand that a charitable gift annuity is irrevocable and that, at the death of the last annuitant, the portion of my contribution remaining after satisfying the annuity payment obligation will be used by the United Methodist Foundation for the purpose stated above.

Signature of Donor(s): \_\_\_\_\_ Date: \_\_\_\_\_

\_\_\_\_\_ Date: \_\_\_\_\_