

FRIENDS FIDUCIARY CORPORATION
1650 Arch Street, Suite 1904, Philadelphia, PA 19103

Charitable Gift Annuity Application Form

Type of Gift: CHARITABLE GIFT ANNUITY
 (choose one) DEFERRED CHARITABLE GIFT ANNUITY – Date of first annuity payment _____
 FLEXIBLE CHARITABLE GIFT ANNUITY – Years for first annuity payment _____
 For all gift types, please indicate your choice of the ACGA (max.) rate or a lower payout rate of: _____%

Donor Information

Name		Social Security Number	
Name		Social Security Number	
Street Address			Telephone Number ()
City	State	Zip	

Life Income Beneficiary #1 (if same as donor, please note and insert birth date)

Name		Social Security Number	
Street Address			Telephone Number ()
City	State	Zip	
Birth Date			

Life Income Beneficiary #2

Name		Social Security Number	
Street Address			Telephone Number ()
City	State	Zip	
Birth Date			

Charitable Beneficiary 1: _____ % **Is this gift anonymous?** Y N

Name		Telephone Number	
Contact Person			
Street Address			
City	State	Zip	
Charitable Use			

Charitable Beneficiary 2: _____ % **Is this gift anonymous?** Y N

Name		Telephone Number	
Contact Person			
Street Address			
City	State	Zip	
Charitable Use			

List additional charitable beneficiaries on a separate page.

Please complete all three pages

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Gift Information

Check: Check Number _____ Amount \$ _____

I will wire transfer this gift. Please provide necessary information.

Securities (List below):

I will instruct my broker to transfer this gift. Please provide necessary information.

I will forward physical certificates under separate cover.

Name of Stock/Bond	Number of Shares	Present Value	Date Acquired	Cost Basis
				\$
				\$
				\$
				\$

 Donor Name

 Donor Signature

 Date

 Donor Name

 Donor Signature

 Date

To the Donor: Friends Fiduciary Corporation (FFC) is a non-profit corporation, whose mission is to supply financial services to other Quaker non-profit organizations and Meetings. These services include investment management and planned giving gift administration services. In making this gift, FFC will issue your annuity agreement and make the annuity payments to you, or whomever you designate as the annuitant. At the conclusion of the annuity payments, FFC will distribute the remainder to the charity/charities you have designated. If you should have any questions, please talk with your development officer or contact Melissa Stoner, Program Director ~ 215-241-7272 or melissa@friendsfiduciary.org ~ in the FFC office.

Please complete all three pages

Direct Deposit Authorization

- I (we) do not wish to authorize direct deposit at this time.
- I (we) hereby authorize Friends Fiduciary Corporation (FFC) to initiate credit entries and to initiate, if necessary, debit entries and adjustments for any credit entries made in error to my/our (check one):
- Checking Savings

Account as checked above and the depository named below, and to credit and or debit the same to such account.

Bank/Depository Name _____

ACH Credit Routing Number: _____
(Please confirm the ACH Credit Routing number with your bank/depository – This number may be different than the number printed on your checks or deposit slips.)

Account Number _____

Name on the Account _____

This authority is to remain in full force and effect until FFC has received written notification from me (or either of us) of its termination in such time and in such manner as to afford FFC and the Bank/Depository a reasonable opportunity to act upon the request for termination.

Name _____ Signature _____

Name _____ Signature _____

Date _____