

## Response / Request Form

There is no obligation on your part in requesting information or a personal analysis of your financial circumstances. Any information provided by you will be maintained in the strictest of confidences and any response by us is for your informational purposes only.

To fax or mail this information to us, please print this page.

**Your Name:**

**Your Title:**

**E-Mail Address:**

(We must have this to respond to you by e-mail)

**Phone Number:**

**Work Phone:**

**Mailing Address:**

### Information Request:

Please contact me about the following:

- Cash Gift
- Appreciated Securities
- Real Estate
- Bequests
- Life Insurance
- Charitable Remainder Trusts
- Charitable Gift Annuities
- Retirement Assets

**Are you considering a gift currently?**

- Yes
- No
- Uncertain

**Would you like to inform us of a bequest or other gift?**

- Yes, I have made a bequest or other planned gift and would be pleased to have my name included as a donor.
- Yes, I have made a bequest or other planned gift but I would prefer to remain anonymous.

**Additional Comments or Requests:**

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**Add to Mailing List:**

- Yes - please mail to above postal address.
- Yes - please e-mail me as above.
- No thank you.

**Calculation Request:**

With the following information, we will provide you with a calculation of your benefits using a Charitable Gift Annuity. For the purposes of this illustration, we will use the Charitable Gift Annuity. There are other gift options that might be better suited for your individual financial circumstances which we will be glad to discuss with you. This is entirely confidential and the information you provide will be held in the strictest confidence.

Age:

If this annuity is to last for the lifetime of another person in addition to yourself, please enter that other person's age:

The dollar amount of the annuity you wish to establish:

If you wish to fund the annuity with appreciated assets, such as stocks, please indicate the original cost or basis of the assets (please disregard if the funding is to be with cash):

Our calculation will make assumptions as to the payout rate and the actual date of the gift. These assumptions are simply to give you a general idea of the income and tax benefits such a gift will provide you. There are other variables that may affect the actual benefits. This calculation is just a general idea of the benefits based on the current information and market conditions available at this time.

If you wish, you may set up the annuity now but defer the income to a future date. If so, please indicate the age (both ages if for two persons) at which you would like to start receiving annuity payments.

Your age at payment start:

Second person's start age: