1. **Donor(s) Information**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Name | *Name* | | | | | | | | |
| Address | *Address* | | | | | | | | |
| City | *City* | | | *State* | *CA* | | *Zip* | *Zip* | |
| Phone | *Phone* | SSN | *Social Security #* | | | Date of Birth | | | *DOB* |

*If two life annuity (i.e. spouse) please list information for second person*

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Name | *Enter Name* | | | | | | | | |
| Address | *Street Address* | | | | | | | | |
| City | *City* | | | *State* | *CA* | | *Zip* | *Zip* | |
| Phone | *Phone* | SSN | *Social Security #* | | | Date of Birth | | | DOB |

**2. Payment Schedule**

Please indicate preferred payment schedule:  Quarterly Semi-annual  Annual

**3. Gift Information**

Please indicate type of gift and information:

**Cash** Please make checks payable to the Pasadena Community Foundation

Check amount: $ Amount

Dated: Date

**Stock** Please see the Pasadena Community Foundation transfer instructions for gifts of stock. The Gift Annuity written will be based upon the net settlement amount of the stock received.

Company/Ticker Symbol: Enter Stock

# of shares: Enter #

**4. Identification**

Please provide a photocopy of your picture identification to verify your age (i.e. drivers license, passport, etc.)

Type of Identification: Type of ID ID #: Number

**5**. **Charitable Gift Amount Options**

In addition to receiving lifetime annuity payments, your charitable gift annuity will provide a generous gift to a charity of your choice.

The following options are available for use of the charitable gift amount\*:

**Option #1-** Immediate grant(s) to your favorite charity or charities in the Pasadena area.

Charity or Charities: Charity and EIN #

**Option #2 –** Immediate grant to the Pasadena Community Foundation.

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Signature of Donor 1 Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Donor 2 Date

\**The “charitable gift amount” represents the present value of the anticipated future charitable gift. Assuming an annual growth rate of 4.5% over the life expectancy of the annuitant (set by the Internal Revenue Service), the “charitable gift amount” would be approximately 50% of the amount of the initial gift. This charitable gift amount will depend upon the annuitant’s age and ACGA life expectancy and is conditioned on the 10-year Treasury Rate at the time of issuance. PCF does not give tax advice please see your CPA if you have any questions.*