



CHARITABLE GIFT ANNUITY APPLICATION

I (We) wish to create a charitable gift annuity with the Kansas Area United Methodist Foundation by making an irrevocable gift of \$ _____ in cash and/or securities (See Part VI).

Complete **Part I** below for a One Life Gift Annuity (payments during the life of one person). Complete **Part I** and **Part II** for a Two Life Gift Annuity (payments during the lives of two persons).

Complete **Part III** to tell us how you want your gift to be used when the gift annuity ends.

Complete **Part IV** to indicate your wishes for publicizing your gift.

Part VI discusses how your annuity will be funded. Attach a check if applicable. If you are using securities to fund your annuity, please contact the Foundation for further instructions.

PART I – DONOR INFORMATION

Provide the following information about yourself as the first or only annuitant:

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Email: _____

Phone: _____ Cell Phone: _____

Date of Birth: ____ / ____ / ____ Social Security Number: ____ - ____ - ____

I would like to receive annuity payments: **Annually** **Semi-annually** **Quarterly**

PART II – COMPLETE ONLY FOR A TWO LIFE ANNUITY

Provide the following information about the second annuitant:

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Email: _____

Phone: _____ Cell Phone: _____

Date of Birth: ____ / ____ / ____ Social Security Number: ____ - ____ - ____

PART III – GIFT BENEFICIARY (IES)

You may name a charity or charities to receive the remainder interest of the annuity upon the death of the annuitant(s). If you do not designate a charitable beneficiary of the annuity, then the Foundation shall be the charitable beneficiary of the annuity. If you designate a specific charity or charities as the charitable beneficiary, the funds remaining in the annuity account upon the death of the annuitant(s), subject to certain restrictions as explained below, will be paid out directly to your designated charities. Your other option is to name the Kansas Area United Methodist Foundation, Inc. as the beneficiary, and create an endowed account in your name with the Foundation, with directions to the Foundation to make at least annual gifts to your designated charities in perpetuity from the endowed account.

The Kansas Area United Methodist Foundation requires that at least 10% of the remainder interest of the annuity upon the death of the annuitant(s) shall be designated for the Kansas Area United Methodist Foundation, to assist the Foundation in continuing to provide its services for charitable gift annuities to participants of The United Methodist Church.

OPTION ONE:

(please check here)

The remaining funds in the annuity to be paid directly to your designated charity or charities upon the death of annuitant(s), less the required distribution of at least 10% of the remainder interest to the Kansas Area United Methodist Foundation.

OPTION TWO:

(please check here)

The funds in the annuity to be directed to the Foundation upon the death of the annuitant(s), to create a permanent endowment fund in your name, with at least annual distributions made to your designated charity or charities.

Please identify the charity or charities to receive the allocated remainder interest of the annuity upon the death of the annuitant(s).

If more charities are to be listed, please attach additional sheets.

PART IV – RECOGNITION OF YOUR GIFT

All donors who use the Foundation to make a gift are recognized by name in the Foundation newsletter and Annual Report. This recognition is one way we express our thanks. Recognition also encourages others to support the United Methodist witness. Gift amounts are not published. If you wish to remain anonymous, we will honor your request.

May we publish your name in recognition of your gift? **YES** **NO**

If you desire anonymity, please indicate how long you wish to remain anonymous:

During my (our) lifetime only: **OR** In perpetuity:

