



United Methodist Foundation of West Virginia, Inc Gift Annuity Information

For those exploring the options offered by Charitable Gift Annuities, the Foundation offers no-obligation, no-cost proposals. One way to begin that process is to send us the following information.

Name		
Address		
City	State	Zip
Home Phone	Work Phone	
Email Address		

Anticipated amount of gift:	If stock, cost basis:
<i>(Minimum amount for gift annuity is \$5000.)</i>	
I am interested in exploring options which would:	
<input type="checkbox"/> Provide the largest income amount. <input type="checkbox"/> Provide the highest tax deduction potential <input type="checkbox"/> Provide a larger eventual gift to the beneficiary by reducing my annuity payments. <input type="checkbox"/> Defer payments of annuity until a later date. Please indicate age when you would like payments to begin:	
Intended recipient of residual of gift:	
<input type="checkbox"/> I am interested in establishing or adding to a perpetual trust with the remainder of my gift that would benefit:	
<input type="checkbox"/> I am interested in a the remainder of the charitable gift becoming an outright gift to benefit:	

<i>Charitable Gift Annuities can be established for one life or for two. If you are interested in a single life gift annuity, please complete the only the First Donor section. If you are interested in a gift annuity for two lives, please complete both Donor sections.</i>		
First Donor	Date of Birth	Social Security Number <i>(optional for proposal)</i>
Second Donor	Date of Birth	Social Security Number <i>(optional for proposal)</i>

Please feel free to call us for more information.

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