



# Gift Annuity Application

- 1. Donor name(s) \_\_\_\_\_
- 2. Donor address \_\_\_\_\_
- 3. Donor phone number \_\_\_\_\_ email \_\_\_\_\_
- 4. Amount of gift (\$10,000 minimum) \_\_\_\_\_
- 5. Payment start date \_\_\_\_\_ immediate or \_\_\_\_\_ defer payments to \_\_\_\_\_  
(Note: All beneficiaries must be at least 60 when payments begin.)
- 6. Type of asset \_\_\_\_\_ cash \_\_\_\_\_ appreciated securities

Note: If gift of cash, the date of the gift is the postmark date on the envelope in which the check is mailed or the date the check is physically delivered to Temple University (if not sent via USPS). If this gift is of securities, the date of gift will be the date the securities arrive in Temple's account. Be sure that the securities have appreciated in value. Contact the Office of Gift Planning by calling 215-926-2545, or send an email to GiftPlanning@temple.edu for specific transfer instructions.

**7. If giving appreciated securities, please provide the required information in the chart below:**

Name of Security	Number of Shares	Approx. Acquisition Date	Cost Basis

**8. If there is more than one donor, please note whether the asset being given is owned by both donors or note the name of the sole owner. This answer may impact the taxation of payments. If you have questions please call us.**

Asset owned by: \_\_\_\_\_ both donors or \_\_\_\_\_ one donor \_\_\_\_\_  
donor's name

**9. My gift shall be used:** \_\_\_\_\_ where the need is greatest or for the following school/college/program:

\_\_\_\_\_

**10. Beneficiary #1 Information** (Note: This is usually the donor.)

Name: \_\_\_\_\_ Relationship to donor(s): \_\_\_\_\_

Address: \_\_\_\_\_

Date of birth: \_\_\_\_\_ Social security number: \_\_\_\_\_

**11. Beneficiary #2 Information** (if there is a second beneficiary)

*If two beneficiaries, income payments are to be made (check one):*

\_\_\_\_\_ jointly, then to survivor or \_\_\_\_\_ to beneficiary #1, then, if living, to beneficiary #2

Name: \_\_\_\_\_ Relationship to donor(s): \_\_\_\_\_

Address: \_\_\_\_\_

Date of birth: \_\_\_\_\_ Social security number: \_\_\_\_\_

I/We acknowledge that I/we have received the Temple University Gift Annuity Disclosure Statement.

**Date:** \_\_\_\_\_ **Donor signature(s):** \_\_\_\_\_

\_\_\_\_\_

Checks should be made payable to Temple University and sent to Temple University, Office of Gift Planning, TASB-3<sup>rd</sup> floor, 1852 North 10<sup>th</sup> St., Philadelphia, PA 19122. For more information call, 215-926-2545, or send an email to GiftPlanning@temple.edu.

For internal use	<b>Gift Officer:</b>	<b>School/College:</b>
	<b>Gift date:</b>	<b>Valuation:</b>