

# Charitable Gift Annuity Inquiry Form

For a printer friendly copy [click here](#). \*you will need **Acrobat Reader**

Please fill out this form and mail it in the postage-paid envelope. The information you provide does not obligate you in any way to contribute for a gift annuity. It will simply allow United Way of America to prepare an annuity illustration for you. The illustration will show the amount of annuity payments you would receive and the tax benefits available to you.

1. I am interested in an illustration for:

One life  Two lives (payments made to you and another person for the duration of your lives)

2. The illustration should be in the amount of:

\$10,000  \$25,000  \$50,000 \$\_\_\_\_\_ Other

3. The property contributed for the annuity would be:

Cash  Bonds  Stocks

Please indicate approximate cost basis if property other than cash is to be contributed.

Cost basis \$\_\_\_\_\_

4. Names and birth dates of annuitants (those who will receive annuity payments):

First annuitant: Second annuitant:

\_\_\_\_\_  
Name Name

\_\_\_\_\_  
Address Address

\_\_\_\_\_  
City, State, ZIP City, State, ZIP

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Birth Date Telephone Birth Date Telephone

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