



# Pasadena Community Foundation

## Gift Annuity Application

### 1. Donor(s) Information

Name					
Address					
City		<i>State</i>		<i>Zip</i>	
Phone		SSN		Date of Birth	

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

Name					
Address					
City		<i>State</i>		<i>Zip</i>	
Phone		SSN		Date of Birth	

### 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: \$ \_\_\_\_\_  
 Dated: \_\_\_\_\_

**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: \_\_\_\_\_  
 # of shares: \_\_\_\_\_

### 4. Identification

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

Type of Identification: \_\_\_\_\_ ID #: \_\_\_\_\_



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### 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:

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

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Signature of Donor 1 Date

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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.*