SAMPLE LETTER FOR AN ANNUITANT TO USE

IN ELECTING THE DATE ON WHICH

FLEXIBLE DEFERRED GIFT ANNUITY PAYMENTS ARE TO BEGIN

*Before furnishing this letter to the annuitant, the charity should fill in the addressee info, the Re: line, and the dates/amounts in the two columns.  The annuitant can then fill in their chosen amount/date in the last paragraph and sign/date the letter.*

*[Date]*

*[Name, title, and address of contact at charity]*

Re: *[Annuity being commuted, including date of agreement and/or agreement number]*

Dear *[Salutation for contact at charity]*:

Paragraph *[#]* of the agreement governing the annuity named above requires that I elect the date on which annuity payments are to commence. In addition, Schedule *[Letter]* of the agreement indicates the annuity amount associated with each possible commencement date. Those dates and amounts appear below:

|  |  |
| --- | --- |
| If payments commence  on this date, | this will be the  annual annuity amount: |
|  |  |
| *[Date]* | *[Amount]* |
| *[Date]* | *[Amount]* |

*[List each elective payment start date and its associated*

*elective payment amount in order from earliest to latest.]*

I am sending you this letter to inform you that I am electing to receive an annuity of *[amount]* beginning on *[elected payment start date]*.

Please contact me to confirm that you have received this letter, to review how the payments are to be made (e.g., by check, by direct deposit, etc.), and to advise me regarding how payments will be taxed.

Sincerely,

*[Name, address, and phone # of annuitant]*