ABC CHARITY

**Deferred Annuity Inquiry Form**

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   
the ABC Charity 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 OR to two other persons for the

duration of their lives)

2. The illustration should be in the amount of:

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

(The minimum contribution for an ABC Charity gift annuity is $ \_\_\_\_\_\_\_.)

3. The property contributed for the annuity would be:

\_\_\_\_ Cash \_\_\_\_ Bonds \_\_\_\_ Stocks \_\_\_\_ Mutual Fund Shares

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

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

4. Payments are to begin on this date: \_\_\_\_\_\_\_\_\_\_\_\_\_

mm/dd/yy

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

First annuitant: Second annuitant:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name Name

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address Address

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City, State, ZIP City, State, ZIP

\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date of birth Telephone Date of birth Telephone