



PRESBYTERIAN  
FOUNDATION

200 East 12th Street  
Jeffersonville, IN 47130

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# Gift Annuity Application

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## Important Notice - Please Read!

Each person named to receive annuity income must provide proof of **date of birth**. Please submit a **legible** copy of a government issued document that includes date of birth, with the application. Acceptable documents are drivers license, government ID card, voter ID card, passport, birth certificate.

Please return the entire application to the Presbyterian Foundation. Prior to delivery, copy the application for your records. For assistance in completing the application contact Client Services at 800-858-6127.

## I. PRESBYTERIAN FOUNDATION – DISCLOSURE STATEMENT

This disclosure statement is provided in accordance with the requirements of the Philanthropy Protection Act of 1995 (P.L. 104-62). The purpose of this disclosure statement is to describe the material terms of the operation of the trusts maintained for the investment and reinvestment of assets given to the Presbyterian Church (U.S.A.) Foundation (hereinafter the “Foundation.”)

The Foundation is a Pennsylvania non-profit corporation, incorporated March 28, 1799, by Act of the General Assembly of the Commonwealth of Pennsylvania, with principal offices located at 200 East Twelfth Street, Jeffersonville, Indiana 47130. Responsibility for governing the Foundation is vested in a Board of Trustees comprised of nineteen persons, who are elected by the General Assembly of the Presbyterian Church (U.S.A.) for staggered three-year terms, plus the Stated Clerk of the General Assembly and the Executive Director of the General Assembly Council, ex officio.

When you establish a gift annuity with the Foundation, annuity payments will be made to the named annuitants for life. These payments are a general obligation of our organization, and they are backed by Foundation-owned funds. While under no legal obligation to do so, the Foundation may elect to purchase an annuity with a commercial insurance company to fund a payment stream to the Foundation for the duration of an annuitant’s life (hereinafter referred to as “reinsurance”) with the annuitant’s life being the measuring life and the timing and amount of the payments being substantially the same as the timing and amount of payments that the Foundation is obligated to pay the annuitant under the charitable gift annuity agreement. Also, for the Foundation’s administrative convenience and solely at its discretion and on its own behalf, the Foundation may elect to direct the commercial insurance company to make the payments generated by this annuity directly to the annuitant in fulfillment of the Foundation’s obligation to the annuitant under the annuity contract.

You should know that: (1) If the Foundation reinsures a charitable gift annuity that portion of the Donors gift equal to the actuarial residuum of the gift that is not used to purchase the commercial annuity will be used by the Foundation immediately for those purposes described in the charitable gift annuity agreement. Any remaining portion of the gift, after commercial annuity premiums and actuarial residuum use, may be used by the Foundation for its general purposes; (2) If the Foundation does not reinsure the charitable gift annuity, the gift shall be held by the Foundation until the termination of the annuity obligation, and at that point the actual residuum shall be used by the Foundation for those purposes described in the charitable gift annuity agreement.

The proceeds of assets which are irrevocably given to the Foundation for a charitable gift annuity from donors in all states but California (except for those charitable gift annuities reinsured by the Foundation) are placed in the Presbyterian Foundation Gift Annuity Reserve Trust (hereinafter the “Trust”). The proceeds of assets which are irrevocably given to the Foundation for a gift annuity from donors in California (except for those charitable gift annuities reinsured by the Foundation) are placed in the Presbyterian Foundation California Gift Annuity Reserve Trust (hereinafter the “CA Trust”). Trust and CA Trust assets are fully segregated from all other assets of the Foundation. The only assets placed in the Trust and CA Trust are the proceeds from assets irrevocably given to the Foundation for gift annuities. The Trust value was \$80,021,027 and the CA Trust value was \$12,173,490 as of December 31, 2009. A portion of the Trust represents the gift annuity reserve, \$78,572,298, invested in accordance with the laws of those states, other than California, in which the Foundation offers gift annuities that require a gift annuity reserve, and a portion of the CA Trust represents the California gift annuity reserve, \$11,660,372, invested in accordance with the laws of the State of California.

The Foundation invests the trusts in a combination of bonds and equities in accordance with applicable state laws. The current investment objective of the trusts is to provide high current income through investment in a diversified portfolio. Modest capital appreciation is a secondary objective. These investment objectives are subject to change by the Board of Trustees of the Foundation.

Professional investment managers may be retained by the Foundation for the trusts and compensated out of the trusts. The Foundation employs the investment management firm, the Bank of New York/ Mellon, to provide investment management and custody services. Expenses allocated to the trusts include custody fees, investment management fees and administrative fees for services rendered by the Foundation, its affiliates and third parties. The Foundation does not receive any commissions based on size or number of gifts. More information on fees allocated to the trusts is available from the Foundation upon request.

A charitable gift may entitle you to income, gift and estate tax benefits. However, because a charitable gift is involved, the annuity rates offered by the Foundation are generally lower than those available through commercial annuities offered by financial institutions. The Foundation does not provide legal, tax or any other professional advisory services. A charitable gift annuity should not be treated as an investment made for private gain. As with all such decisions, you should consult with your advisor regarding the tax treatment of, and other aspects related to, making this gift.

Annuitants will receive IRS Form 1099 in January of each year.

Common investment funds managed by the Foundation are exempt from registration requirement of the federal securities laws, pursuant to the exemption for collective investment funds and similar funds maintained by charitable organizations under the Philanthropy Protection Act of 1995 (P.L. 104-62).

**The Presbyterian Foundation will make additional financial information, including its most current audited and interim financial statements, available to donor upon request.**

## II. PRESBYTERIAN FOUNDATION - PRIVACY POLICY NOTICE

At the Presbyterian Church (USA) Foundation (the “Foundation”), we are committed to handling donor information responsibly. We recognize and respect the privacy expectations of those who make (and receive) charitable gifts through the Foundation and believe the confidentiality and security of personal financial information communicated to us is one of our fundamental responsibilities.

This Notice applies only to Foundation donors who have a direct relationship with us (if you established an account with, or otherwise donated to, the Foundation through another charitable organization, their privacy policies may apply). This Notice applies to donors who come to us and establish a charitable gift, regardless of which gift plan is selected. Donors who contribute to an already established permanent fund, however, are not covered by this Notice. In these situations, we may, and often do, advise the donor who created the fund originally that you have contributed to the fund.

Our Privacy Policy will continue to cover information we may collect about you at the time a gift is established with the Foundation, during the life of that gift and after its conclusion. Please note that we may amend this Notice at any time and will inform you of any changes to this Notice as required by law.

### **We respect your privacy.**

We appreciate that you may have provided us with personal financial information. We strive to maintain the privacy of such information. This Notice describes what non-public personal information we collect about you, why we collect it, and when we may share it with others, including entities affiliated with us, such as the Presbyterian Church (U.S.A.), A Corporation, the New Covenant Funds and the New Covenant Trust Company, N.A. and other related charitable organizations (collectively “our affiliated companies”), as well as with those not affiliated with us. Throughout this Notice, we refer to the non-public information that personally identifies you or your accounts as “personal information.”

#### **1. What personal information do we collect about you?**

To serve you better and manage your charitable gift, it often is important that we collect and maintain accurate information about you. We may obtain this information from forms you submit to us, from your dealings with us, from our Web sites, and from other sources.

For example:

- We may collect information, such as your name, address, e-mail address, telephone/fax numbers, and payment information, through forms you submit to us, and telephone and other contacts you have with us.
- We may obtain information about your charitable fund balances and your contributions to charitable funds through your transactions with us.
- We may collect background information from and through third-party vendors to confirm information you provide and to comply with various regulatory requirements.

#### **2. When do we disclose personal information we collect about you?**

To serve you better and manage your charitable gift, we may disclose personal information we collect about you to our affiliated companies and to non-affiliated third parties as set forth below.

##### **a. Information we disclose to our affiliated companies**

In order to manage your account(s) effectively, including servicing and processing your transactions, to let you know about products and services offered by us and our affiliated companies, and as otherwise required or permitted by law, we may disclose personal information to our affiliated companies. Offers for products and services from our affiliated companies are developed under conditions designed to safeguard your personal information.

##### **b. Information we disclose to third parties**

We do not disclose personal information that we collect about you to non-affiliated third parties, except to enable them to provide services on our behalf, to perform certain joint marketing and servicing agreements with other financial institutions, or as otherwise required or permitted by law.

#### **3. How do we protect the security and confidentiality of personal information we collect about you?**

We maintain physical, electronic and procedural security measures to help safeguard the personal information we collect about you. We have internal policies governing the proper handling of client information. Third parties that provide support or marketing services on our behalf may also receive personal information, and we require them to adhere to confidentiality standards with respect to such information.

#### 4. How can you limit the sharing of certain types of personal information with our affiliated companies?

We respect your privacy and offer you choices as to whether we share with our affiliated companies personal information that we collected to determine your eligibility for products and services you request (“eligibility information”). Please note that, even if you direct us not to share eligibility information with our affiliated companies (“eligibility opt out”), we may still share personal information, including eligibility information, with those companies in circumstances excluded from the opt out under applicable law, such as to process transactions or to service your account. We may also share certain other types of personal information with our affiliated companies such as your name, address, telephone number, e-mail address and account number(s), and information about your transactions and experiences with us. If you wish to opt out, you may do so by:

- Calling us toll-free at **1-800-858-6127**
- Writing to us at the following address:  
**200 East Twelfth Street**  
**Jeffersonville, IN 47130**

Additionally, independent of your right to direct us not to share your eligibility information with our affiliated companies, you may limit our affiliates from marketing (“marketing opt out”) their products or services to you based on eligibility information that we share with them. This limitation does not apply in certain circumstances, such as if you currently do business with one of our affiliates or if you ask to receive information or offers from them. If you wish to limit such marketing offers, you may do so by:

- Calling us toll-free at **1-800-858-6127**
- Writing to us at the following address:  
**200 East Twelfth Street**  
**Jeffersonville, IN 47130**

If you choose to write to us for either eligibility opt out or marketing opt out, your written request should include your name, address, telephone number and account number(s) to which the opt out applies and should not be sent with any other correspondence. In order to process your request, we require that the request be provided by you directly and not through a third party. If you have previously notified us about your privacy preferences, it is not necessary to do so again unless you decide to change your preferences. Your opt-out preference will remain in effect with respect to this Privacy Policy (as it may be amended) until you notify us otherwise in writing. If you have a joint account, your direction for us not to share this information with our affiliated companies will be applied to all account holders on that account.

#### 5. Important Information for residents of California and Vermont

If you are a resident of Vermont, you are automatically considered to have opted out of sharing with our affiliated companies. Additionally, if you are a resident of Vermont, we will only share your personal information pursuant to a joint marketing agreement as allowed by applicable law. If you are a California resident, **you have additional rights to limit how we use your personal information**. Please refer to the **addendum entitled “Important Privacy Choices for Consumers”**.



**IV. GIFT INFORMATION**

**NOTE:** By submission of this Application and your gift to the Foundation you hereby acknowledge your intent to make a charitable donation to the Foundation of the assets described herein including additional pages, on the date such assets are received by the Foundation along with this Application. You further acknowledge that the Foundation may consider your gift irrevocable upon receipt of the assets, subject to its promise to provide a written gift annuity agreement to be executed by all parties containing the information contained in this Application, and that as the new owner of your gift the Foundation may sell any non-cash assets upon receipt. If you do not execute the charitable gift annuity agreement that is sent to you, your cash gift and/or the proceeds of non-cash assets will be returned to you. If you made a non-cash gift, and the proceeds are returned, you may have experienced gains or losses on the sale of the asset and could have a taxable event with respect to gains recognized on the sale of those assets.

Please initial to signify you acknowledge this provision: Donor #1 \_\_\_\_\_ Donor #2 \_\_\_\_\_

**A. Cash** Please make checks payable to Presbyterian Church (U.S.A.) Foundation.  
Checks will be presented for payment upon receipt and will not be held until a post-dated date.

Donor Name(s) \_\_\_\_\_ Amount \$ \_\_\_\_\_  
\_\_\_\_\_ Amount \$ \_\_\_\_\_

Form of Ownership  
 Solely owned  Joint tenants with right of survivorship  
 Community property  Revocable Trust (Complete Trust Revocation Notification)

**Credit Card** (complete the following) Amount \$ \_\_\_\_\_  
Name on Credit Card \_\_\_\_\_ Credit Card Type  MasterCard  Visa  
Credit Card Number \_\_\_\_\_ Expiration Date \_\_\_\_\_

**NOTE:** A bank fee will be charged for credit card gifts. This fee will not affect the value of your gift for contribution purposes.

**B. Securities** (Complete the following for each security, copy and use multiple pages as needed.)

Security Description/Symbol Example: 100 ABC Growth 123456789 ABCGX _____ _____ _____	<b>Securities Information</b> <input type="checkbox"/> Common Stock <input type="checkbox"/> Preferred Stock <input type="checkbox"/> Bond <input type="checkbox"/> Mutual Fund	<b>Owner(s) Name(s)</b> _____ <input type="checkbox"/> Solely owned <input type="checkbox"/> Community property <input type="checkbox"/> Joint tenant with right of survivorship <input type="checkbox"/> Revocable Trust (Complete Trust Revocation Notification) <input type="checkbox"/> Irrevocable Trust (Provide Trust Documentation)
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Cost Basis per share \_\_\_\_\_ Acquisition Date \_\_\_\_\_  
(Cost basis is assumed zero, if not provided.) (Acquisition is assumed long-term, if not provided.)

Are you giving certificated securities in excess of the shares necessary to complete the Gift?  Yes  No

If Yes, complete the following: Number of shares attributable to Gift \_\_\_\_\_  
Number of shares to be returned to Donor \_\_\_\_\_

**Delivery Method**  DTC  Physical Certificate  Mutual Fund  
(Transferred from Broker) (Delivered to Jeffersonville, IN) (Transferred to Foundation account)  
Expected date assets will arrive at Foundation/in Foundation account \_\_\_\_\_

Delivering Firm \_\_\_\_\_ Mutual Fund Donor's Account # \_\_\_\_\_  
Street Address \_\_\_\_\_ Contact Name \_\_\_\_\_  
City, State, Zip \_\_\_\_\_ Contact Phone \_\_\_\_\_

**V. ANNUITY INFORMATION**

**Deferred Annuity Option**  No  Yes – If Yes, payments to begin on first day of \_\_\_\_\_ (month), \_\_\_\_\_ (year).  
*(Deferred Payments must begin more than one year from date of Gift. Default is “No.”)*

**Type of Annuity Requested**

- Single life (pays first annuitant)  Joint & survivor (pays both annuitants, followed by survivor)
- Two lives (pays first annuitant, then second annuitant)

**Right to Revoke Election**

The right (or power) of revocation in charitable gift annuities involves the ability of a donor to terminate some portion of the future annuity interest of an annuitant or successor annuitant. The exercise of this right ends the Foundation’s obligation (either in whole or in part) to pay an annuity after the death of the revoking donor. The right to revoke is an optional feature. Right to revoke does not apply to a single life annuity when the donor is the annuitant. The right to revoke may be exercised only by will and an annuity interest cannot be revoked by any non-testamentary means. Notwithstanding any other provision of this Application:

I, \_\_\_\_\_ (Print name, Donor #1) reserve the right to terminate by will the right of an annuitant to receive annuity payments attributable to that portion of the property delivered by me under this Application.

I, \_\_\_\_\_ (Print Name, Donor #2) reserve the right to terminate by will the right of an annuitant to receive annuity payments attributable to that portion of the property delivered by me under this Application.

**Annuity Rate**

- I request a charitable gift annuity at the maximum rate the Foundation offers as of the date this Application is accepted. *(Default if no selection is made)*
- I request a charitable gift annuity at a rate of \_\_\_\_\_%, which is less than the maximum rate the Foundation offers as of the date this Application is accepted.

**Discount Rate**

- I choose the discount rate for the month of the Gift. *(Default if no selection made)*
- I choose the discount rate for the month of \_\_\_\_\_ as an alternate rate as permitted under Section 7520(a) of the Internal Revenue Code *(no more than two months prior to the current month of the gift)*

**Payment Cycle**

- Monthly  Quarterly *(Default selection)*  Semi-annually  Annually

Non-deferred annuities: Payments desired to begin on the first day of the month of \_\_\_\_\_.  
*(Start date is dependent upon receipt of required documentation. Please allow at least 30 days from the date of this Application)*

**Direct Deposit**

- Yes – If Yes, Annuitant(s) must complete Direct Deposit Authorization.  No

**Annuitant(s)**

**NOTE: If an annuitant is the donor, it is not necessary to complete any information in this section except for the annuitant’s title and name. If an annuitant is not the donor, the annuitant must also complete IRS Form W-9 before the annuity will be paid**

<b>First Annuitant or Joint Annuitant #1</b>			
Name _____		Date of Birth _____	
Title	First	Middle	Last
SSN _____		Relationship to Donor _____	
		<input type="checkbox"/> Male <input type="checkbox"/> Female	
Primary Home Address _____			
City _____		State _____	Zip _____
E-Mail Address _____			
Home Telephone ( ) _____		Work Telephone ( ) _____	
<b>Second Annuitant or Joint Annuitant #2</b>			
Name _____		Date of Birth _____	
Title	First	Middle	Last
SSN _____		Relationship to Donor _____	
		<input type="checkbox"/> Male <input type="checkbox"/> Female	
Primary Home Address _____			
City _____		State _____	Zip _____
E-Mail Address _____			
Home Telephone ( ) _____		Work Telephone ( ) _____	

## VI. CHARITABLE USE

Please indicate below the manner in which the residuum of your gift is to be used by the Foundation. If the Foundation elects to reinsure the annuity payment the actuarial residuum will be used upon the purchase of the reinsurance. If the annuity payments are not reinsured, the actual residuum will be used upon the termination of the annuity obligation.

You may indicate that the residuum of your gift (1) be added to an existing Permanent Fund, (2) be added to a Permanent Fund to be established under an existing Charitable Gift Annuity Agreement, (3) establish a new Permanent Fund, (4) be used for the general charitable purposes of the Foundation, or (5) be distributed in a "lump sum" payment to a specific charitable beneficiary. If your specified use cannot be fulfilled, e.g. the charitable beneficiary has ceased to exist, has ceased to be related to the Presbyterian Church (U.S.A.), has lost its tax exempt status or the purpose of the Permanent Fund cannot be fulfilled, you may suggest a contingent purpose and /or beneficiary.

If you wish to create a Permanent Fund, please note that each Permanent Fund may only have one charitable beneficiary. A Permanent Fund may only be established for Presbyterian or Presbyterian-Related charitable beneficiaries. Additional Permanent Funds should be established for additional charitable beneficiaries. If no fund name is indicated for each Permanent Fund, the fund name shall be known by your name as the donor. If no fund name is noted, your name, as the donor, shall be public. If no restriction is noted for a Permanent Fund, the use of the income from the Permanent Fund shall default to unrestricted. Due to the market investments, each separate Permanent Fund established under this Application may vary in value over time.

Use for \_\_\_\_\_ % of gift residuum (select one choice only - copy and use up to four additional sheets if needed)

1.  Add to an existing Permanent Fund

Fund Name \_\_\_\_\_ Number \_\_\_\_\_

2.  Add to a Permanent Fund to be established under an existing Charitable Gift Annuity.

Fund Name \_\_\_\_\_ Agreement Number \_\_\_\_\_

3.  Establish a Permanent Fund paying income to the charitable beneficiary named below (\$25,000 minimum required to establish).

Fund Name \_\_\_\_\_

Yes (Default is Yes)  No-Donor gives the charitable beneficiary the right to reinvest or accrue Permanent Fund income.

4.  Use for the general charitable purposes of the Foundation.

5.  Distribute in a "lump sum" payment to the charitable beneficiary named below.

Charitable Beneficiary Name \_\_\_\_\_ Phone (\_\_\_\_) \_\_\_\_\_

Address \_\_\_\_\_ City, State, Zip \_\_\_\_\_

Restrictions on the use of the income from Permanent Fund or "lump sum" distribution:

Unrestricted

Unrestricted, but with a preference for: \_\_\_\_\_

Restricted: \_\_\_\_\_

Yes (Default is Yes)  No May we inform the Charitable Beneficiary of this gift, including your name?

Contingent Charitable Beneficiary Name \_\_\_\_\_ Phone (\_\_\_\_) \_\_\_\_\_

Address \_\_\_\_\_ City, State, Zip \_\_\_\_\_

Restrictions on the use of the income from Permanent Fund or "lump sum" distribution:

Unrestricted

Unrestricted, but with a preference for: \_\_\_\_\_

Restricted: \_\_\_\_\_

## VII. STATEMENT OF UNDERSTANDING

It is my/our desire to make an **irrevocable** gift to the Foundation and I/we hereby affirm and declare by my/our signature that I/we:

- Understand that, if the information I have completed herein is satisfactory to the Foundation, it will execute a charitable gift annuity agreement with me/us containing such information in consideration of my gift;
- Understand that the Foundation is under no obligation to enter into a charitable gift annuity agreement with me/us if the information contained in this Application is unacceptable to it, and that it will return my gift under such circumstance;
- Understand that there is no binding agreement between the Foundation and me/us until all parties have executed the charitable gift annuity agreement and it has been returned to the Foundation.
- Understand that such charitable gift annuity agreement will obligate the Foundation to pay an annuity payment to the annuitant(s) I/we have named herein for the life of such annuitant(s);
- Acknowledge that the Foundation has not rendered any legal or tax advisory service to me/us;
- Understand that I/we should consult with my/our own advisors for determining the tax or other benefits and consequences of making this gift and entering into a charitable gift annuity agreement with the Foundation;
- Understand that a charitable gift annuity should not be treated as an investment made for private gain;
- Understand that the gift annuity agreement that I/we will execute in consideration of my/our gift is not revocable and has no cash value;
- Intends to make a charitable gift to support a charitable beneficiary named in this Application.
- Affirm that the funds utilized to make this gift are not needed by me/us to meet unexpected financial emergencies;
- Affirm and declare that the acquisition date and the cost basis for any non-cash gift are as described in this Application. If no acquisition date is provided for the non-cash property given, then I/we represent that such property is long-term capital gain property; if no cost basis is provided, I/we declare the cost basis to be \$0.00 and acknowledge this will result in the greatest possible taxable portion of the Annuity Payment.
- Affirm and acknowledge to be true to the best of my/our knowledge all of the statements contained herein, both in my individual capacity and in my joint capacity with a joint donor, if applicable; and

**SUBSTITUTE W-9** (for each Donor signing below): *under penalties of perjury, I certify that the number shown on this Application is my correct taxpayer identification number (social security number). I further certify that I am a U.S. person (including a U.S. resident alien), and not subject to backup withholding because (a) I am exempt from backup withholding, (b) I have not been notified by the Internal Revenue Service that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the Internal Revenue Service has notified me that I am no longer subject to backup withholding.* (The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.)

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### For Individuals

Donor #1 Signature \_\_\_\_\_ Date \_\_\_\_\_

Donor #2 Signature \_\_\_\_\_ Date \_\_\_\_\_

### For Irrevocable Trust/Estate/Organization Donors (signatures of two officers are required for organizations)

Trustee/Executor/Officer #1 Signature \_\_\_\_\_ Title \_\_\_\_\_ Date \_\_\_\_\_

Trustee/Executor/Officer #2 Signature \_\_\_\_\_ Title \_\_\_\_\_ Date \_\_\_\_\_

**NOTE:** *If an agent/attorney is signing this Application on behalf of a donor, the power of attorney document must be included with this Application and must specifically authorize the agent/attorney to make charitable gifts on behalf of the donor.*

**VIII. Spousal Waiver**

*If you are a resident of one of the states listed below and your spouse is not a donor in this Agreement, his or her signature is required to show consent to your charitable gift.*

- |            |           |                |              |               |      |
|------------|-----------|----------------|--------------|---------------|------|
| Arkansas   | Idaho     | Minnesota      | Nevada       | South Dakota  | Utah |
| California | Iowa      | Montana        | Oklahoma     | Washington    |      |
| Colorado   | Kansas    | North Carolina | Ohio         | West Virginia |      |
| Florida    | Louisiana | North Dakota   | Pennsylvania | Wisconsin     |      |

I, \_\_\_\_\_ (print name), as the spouse of \_\_\_\_\_ (print name), do hereby consent to the gift made with this Application and do hereby release all dower/curtsey rights provided to me in the property consisting of this gift.

Spouse Signature \_\_\_\_\_ Date \_\_\_\_\_

I, \_\_\_\_\_ (print name), as the spouse of \_\_\_\_\_ (print name), do hereby consent to the gift made with this Application and do hereby release all dower/curtsey rights provided to me in the property consisting of this gift.

Spouse Signature \_\_\_\_\_ Date \_\_\_\_\_

**IX. MAILING INFORMATION - MAIL ENTIRE COMPLETED AND SIGNED APPLICATION**

For cash gifts (except by credit card), mail via US Postal Service to:

For cash gifts when using overnight mail:

For cash gifts by credit card, and gifts of securities:

Presbyterian Foundation  
P.O. Box 406863  
Atlanta, GA 30384-6863

Bank of America Lockbox  
Services  
Lockbox #406863  
6000 Feldwood Road College  
Park, GA 30349  
1-800-376-8313

Presbyterian Foundation 200  
East Twelfth Street  
Jeffersonville, IN 47130 1-  
812-288-8841

**X. PREPARATION INFORMATION**

This Application was prepared by:  Donor  Foundation Employee: \_\_\_\_\_

Charitable Beneficiary Employee Name: \_\_\_\_\_

Name of Charitable Beneficiary \_\_\_\_\_

Other (Name) \_\_\_\_\_ Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_ Telephone \_\_\_\_\_

**Foundation Use Only**

Foundation Development Officer \_\_\_\_\_

Date Application received by Foundation Development Officer \_\_\_\_\_

Date Assets received by Foundation Development Officer \_\_\_\_\_

Check if assets are to be transferred separately from this Application

Type of assets sent separately  Cash  Securities  Other Property