

**I. DONOR INFORMATION** *Individuals complete Section A; Organizations complete Section B*  
*Submit Addendum for additions to other funds***Section A****Donor #1** Name \_\_\_\_\_  
Title \_\_\_\_\_ First \_\_\_\_\_ Middle \_\_\_\_\_ Last \_\_\_\_\_**Donor #2** Name \_\_\_\_\_  
Title \_\_\_\_\_ First \_\_\_\_\_ Middle \_\_\_\_\_ Last \_\_\_\_\_

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

Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_ E-Mail Address \_\_\_\_\_

Home Church (optional) \_\_\_\_\_ Address \_\_\_\_\_  
\_\_\_\_\_**Section B****Organization Name** \_\_\_\_\_ Trade/Common Name \_\_\_\_\_

Contact Name \_\_\_\_\_ Tax Identification Number \_\_\_\_\_

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

Daytime Phone \_\_\_\_\_ Fax \_\_\_\_\_ -Mail Address \_\_\_\_\_

**II. FUND INFORMATION** *(Please complete all fields regarding the Permanent Fund you wish to benefit with your gift)*

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

Addition Amount \$ \_\_\_\_\_ OR Addition Percentage \_\_\_\_\_

*(Use if you are splitting your gift between multiple permanent funds,  
and wish to split your gift in percentage proportions.)**Do you give the Foundation permission to publish your name, i.e.  
publications, websites honoring donors, notification to interested  
parties to give recognition?*  Yes  No*The charitable beneficiary will be notified of your addition to the  
Permanent Fund. May the Foundation include your name with this  
notification?*  Yes  No**If this information is not completed by the Donor(s), the Foundation will release and/or publish your name.****III. GIFT INFORMATION****Cash Gift** *(Please make checks payable to Presbyterian Foundation)*

Owner Name(s) \_\_\_\_\_ Gift Amount \$ \_\_\_\_\_

**Credit Card Payment** Name as it appears on your credit card \_\_\_\_\_Credit Card type  Master Card  Visa Credit Card Number \_\_\_\_\_ Expiration Date \_\_\_\_\_*A bank fee will be charged for the utilization of a credit card payment. This fee will be charged against the account benefiting from your addition and  
will not affect the value of your Gift for deduction purposes.*

**Securities - Complete the Securities Notification Addendum**

The value of the securities on the Gift Date, along with any other assets identified in this document, shall determine the value of the Gift. The value of the Gift shall be determined net of back-end sales charges or redemption fees. If the Donor(s) is delivering shares of certificated securities in excess of the shares necessary to complete the gift, the number of shares to be gifted must be specified on the Securities Notification Addendum, along with the number of shares that the Donor(s) is requesting to be returned.

*Notify the Operations Department of the Foundation of all security transfers prior to transfer by faxing the attached Securities Notification Addendum to 502-569-5980, e-mailing the information to [securitiesmailbox@fdn.pcusa.org](mailto:securitiesmailbox@fdn.pcusa.org), or contacting the Foundation Client Services department at 800-858-6127. The original completed Securities Notification Addendum must be mailed with this form.*

**Other Property** (For information about Foundation requirements for transferring Other Property please call Client Services at 800-858-6127.)

**Gift Description** \_\_\_\_\_

**Owner Name(s)** \_\_\_\_\_

**Ownership of Gift**

- Solely owned
  - Community property
  - Joint tenant with right of survivorship
  - Tenants in common *(List percentage of Other Property owned by each Owner)*
  - Trust *(Complete Trust Revocation Notification)*
- Owner \_\_\_\_\_ Percentage of ownership \_\_\_\_\_%
- Owner \_\_\_\_\_ Percentage of ownership \_\_\_\_\_%

**IV. STATEMENT OF UNDERSTANDING**

**Individual Donors**

It is my desire to make this **irrevocable** gift to the Presbyterian Foundation to add to the Permanent Fund(s) identified on this document and addenda:

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

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

*Note: If a Power of Attorney is signing this form on behalf of a Donor, the Power of Attorney authorization must be included with this form and must authorize the Power of Attorney to make charitable gifts on behalf of the donor.*

**Organization Donors - signatures of two officers are required**

It is the organization's desire to make this **irrevocable** gift to the Presbyterian Foundation to add to the Permanent Fund(s) identified on this document and addenda:

Officer #1 Signature \_\_\_\_\_ Title \_\_\_\_\_ Date \_\_\_\_\_

Officer #2 Signature \_\_\_\_\_ Title \_\_\_\_\_ Date \_\_\_\_\_

**V. MAILING INFORMATION**

For cash gifts,  
via U.S. postal system to:  
Presbyterian Foundation  
P.O. Box 406863  
Atlanta, GA 30384-6863

Or by overnight mailing to:  
Bank of America  
Lockbox Services (lockbox #406863)  
6000 Feldwood Road  
College Park, GA 30349

For gifts of securities and other property,  
send information to:  
Presbyterian Foundation  
200 East Twelfth Street  
Jeffersonville, IN 47130



## What does the Presbyterian Church (USA) Foundation ('Presbyterian Foundation') do with your personal information?

<b>FACTS</b>		
<b>Why?</b>	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.	
<b>What?</b>	<p>The types of personal information we collect and share depend on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> <li>- Social Security number and account balances</li> <li>- payment history and transaction history</li> <li>- account transactions and checking account information</li> </ul> <p>When you are <i>no longer</i> our customer, we continue to share your information as described in this notice.</p>	
<b>How?</b>	All financial companies need to share clients' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their clients' personal information; the reasons the Presbyterian Foundation chooses to share; and whether you can limit this sharing.	
<b>Reasons we can share your personal information</b>	<b>Does Presbyterian Foundation share?</b>	<b>Can you limit this sharing?</b>
<b>For our everyday business purposes -</b> such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
<b>For our marketing purposes -</b> to offer our products and services to you	Yes	No
<b>For joint marketing with other financial companies</b>	Yes	Yes
<b>For our affiliates' everyday business purposes -</b> information about your transactions and experiences	Yes	Yes
<b>For our affiliates' everyday business purposes -</b> information about your creditworthiness	Yes	Yes
<b>For our affiliates to market to you</b>	Yes	Yes
<b>For nonaffiliates to market to you</b>	Yes	Yes
<b>To limit our sharing</b>	<p>- Call 800-858-6127 or - Mail the form below</p> <p>Please note: If you are a new customer, we can begin sharing your information 30 days from the date we sent this notice. When you are <i>no longer</i> our customer, we continue to share your information as described in this notice.</p> <p>However, you can contact us at any time to limit our sharing.</p>	
<b>Questions?</b>	Call 800-858-6127 or go to <a href="http://www.presbyterianfoundation.org">www.presbyterianfoundation.org</a>	

<b>Mail-in Form</b>	
<b>Mark any/all you want to limit:</b>	
<input type="checkbox"/> Do not share my personal information with other financial institutions to jointly market to me.	
<input type="checkbox"/> Do not share information about my transactions and experiences with your affiliates for their everyday business purposes.	
<input type="checkbox"/> Do not share information about my creditworthiness with your affiliates for their everyday business purposes.	
<input type="checkbox"/> Do not allow your affiliates to use my personal information to market to me.	
<input type="checkbox"/> Do not share my personal information with nonaffiliates to market their products and services to me.	
<b>Name</b>	
<b>Address</b>	
<b>City, State, Zip</b>	

**Mail To:** Presbyterian Foundation  
200 E. 12th Street, Jeffersonville, IN 47130

What we do	
<b>How does the Presbyterian Foundation protect my personal information?</b>	<p>To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.</p> <p>Email addresses will only be provided to affiliates or service providers. Cookies are not used to get data from your hard drive, to get your email address or personal information.</p>
<b>How does the Presbyterian Foundation collect my personal information?</b>	<p>We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> <li>- open an account or provide account information</li> <li>- give us your contact information or pay us by check</li> <li>- tell us your investment or retirement portfolio</li> </ul> <p>We also collect your personal information from others, such as credit bureaus, affiliates or other companies.</p>
<b>Why can't I limit all sharing?</b>	<p>Federal law gives you the right to limit only</p> <ul style="list-style-type: none"> <li>- sharing for affiliates' everyday business purposes information about your creditworthiness</li> <li>- affiliates from using your information to market to you</li> <li>- sharing for nonaffiliates to market to you</li> </ul> <p>State laws and individual companies may give you additional rights to limit sharing. [See below for more on your rights under state law.]</p>
<b>What happens when I limit sharing for an account I hold jointly with someone else?</b>	Your choices will apply to everyone on your account.
Definitions	
<b>Affiliates</b>	<p>Companies related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> <li>- <i>Our affiliates include the Presbyterian Church (USA), A Corporation and New Covenant Trust Company, N.A.</i></li> </ul>
<b>Nonaffiliates</b>	<p>Companies not related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> <li>- <i>Nonaffiliates we share with can include New Covenant Funds.</i></li> </ul>
<b>Joint marketing</b>	<p>A formal agreement between nonaffiliated financial companies that together market financial products or services to you.</p> <ul style="list-style-type: none"> <li>- <i>Our joint marketing partners include New Covenant Funds.</i></li> </ul>
<p>Other important information - If you are a resident of Vermont, you are automatically considered to have opted out of sharing with our affiliated and nonaffiliated companies.</p>	