

# Application for Charitable Gift Annuity with the University of Maine System

University: \_\_\_\_\_

Name of Donor: \_\_\_\_\_

Domiciled In State of: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Town: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Business Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Social Security Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Name of First Annuitant (Can be donor): \_\_\_\_\_

Address: \_\_\_\_\_

Social Security Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Business Phone: \_\_\_\_\_

Name of Second Annuitant: \_\_\_\_\_

Address: \_\_\_\_\_

Social Security Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Business Phone: \_\_\_\_\_

Standard ACGA Rate: \_\_\_\_\_ Other (lower) ACGA Rate: \_\_\_\_\_

See website: <http://www.acga-web.org/giftrates.html>

(please fill in page 2 of form)

**Amount of Gift:** \_\_\_\_\_ **Date of Gift:** \_\_\_\_\_

**Type of Gift:**      **Cash** \_\_\_\_\_ **Securities** \_\_\_\_\_ **Other** \_\_\_\_\_

**Current Return on Asset:** \_\_\_\_\_

If Securities: Name of Stock(s) \_\_\_\_\_

Number of Shares \_\_\_\_\_

Cost Basis \_\_\_\_\_

Name of Stock Broker \_\_\_\_\_

Name of Brokerage Firm \_\_\_\_\_

Address of Brokerage Firm \_\_\_\_\_

Phone # of Brokerage Firm \_\_\_\_\_

**Annuity Type:**      One-Life: \_\_\_\_\_  
                            Two-Life: \_\_\_\_\_  
                            Deferred: \_\_\_\_\_      Payments to Begin on: \_\_\_/\_\_\_/\_\_\_

**Income Tax Rate:** \_\_\_\_\_

**Property Value:** \_\_\_\_\_

**Payment Frequency:**      Quarterly: \_\_\_\_\_  
  Semiannual: \_\_\_\_\_  
  Annual: \_\_\_\_\_

The IRS discount rate (Applicable Federal Rate) affects the deduction. The higher the discount rate, the higher the deduction calculated, but the lower the amount of tax free income that will be received. **Choose one of the following:**

\_\_\_\_\_ Highest discount rate available for a higher deduction

\_\_\_\_\_ Lowest discount rate available for more tax-free income

See website: <http://www.pgcalc.com/drate/>

**Capital Gain Rate:** \_\_\_\_\_

**Descriptive information regarding assets being gifted:**

**Description regarding use of residuum:**