

Checklist After Establishing a Charitable Gift Annuity

- Has Donor received a Crescendo Pro Proposal from the System?_____
- Has Gift Annuity Agreement been drafted?_____ Signed by System?_____
- Has original Gift Annuity Agreement been given to the Donor?_____
- Has Donor signed Disclosure Statement?_____Received Copy?_____
- Has System received copy of signed Disclosure Statement? _____
- Has System received Gift Annuity Asset? _____
- Has Donor been acknowledged by Gift Planning Officer of respective campus?_____
- Has Donor been acknowledged by other individuals? _____ Who?_____ When?_____
- Has Program Number for Gift been established?_____ Program Number_____
- Has Gift Amount been entered into Benefactor?_____ Amount of Present Value?_____
- When will first pro-rated annuity payment be sent to PGO for the donor?_____
- Did letter to donor explain pro-rated payment and inform donor that subsequent checks of the quarterly amount will be arriving directly from the System?_____
- Was 1099R sent to PGO for forwarding to donor with letter of appreciation?_____