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? _______________