



THE ROTARY FOUNDATION

# Charitable Gift Annuity Agreement Form

This form must be submitted to The Rotary Foundation of Rotary International in Evanston, Illinois for acceptance. The annuity contract will be issued in the State of Illinois, and annuitant agrees that this annuity application and any annuity contract issued thereunder will be governed by the laws of the State of Illinois. The Rotary Foundation may issue a gift annuity contract hereunder using the rates suggested by the American Council on Gift Annuities or similar organizations. Annuitant hereby waives any action he/she may have under federal or state antitrust laws as a result of The Rotary Foundation's such rates.

To apply for a Charitable Gift Annuity from The Rotary Foundation of Rotary International, please complete and sign the form below. Send application and check or money order to address provided below. Once your application has been received a Foundation staff member will contact you in order to begin the formal agreement process.

**Donor:**

Mr.       Mrs.       Ms.       Other \_\_\_\_\_

Name: \_\_\_\_\_

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

Telephone Number: (\_\_\_\_\_) \_\_\_\_\_

Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_  
                            Month Day Year

Social Security Number: # \_\_\_\_-\_\_\_\_-\_\_\_\_

**Additional Income Recipient:**

Mr.       Mrs.       Ms.       Other \_\_\_\_\_  Spouse  
 Other \_\_\_\_\_

Name: \_\_\_\_\_

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

Telephone Number: (\_\_\_\_\_) \_\_\_\_\_

Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_  
                            Month Day Year

Social Security Number: # \_\_\_\_-\_\_\_\_-\_\_\_\_

**Please send a Charitable Gift Annuity Contract for:**

Gift Annuity type:  One-Life       Two-Life       Deferred to age \_\_\_\_\_  
in the amount of \$ \_\_\_\_\_ from **The Rotary Foundation of Rotary International**. A minimum of \$10,000 is needed to purchase a gift annuity from The Rotary Foundation.

The gift annuity will be funded with:

Cash (Check or Money order)       Stocks or bonds

*Note: Do not fill out or send stock certificates along with this application -- call The Rotary Foundation Field Services staff for transmittal instructions.*

I understand the assets I am transferring to **The Rotary Foundation of Rotary International** are irrevocable upon receipt of the formal Charitable Gift Annuity contract.

\_\_\_\_\_  
Annuitant signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Second Annuitant signature

\_\_\_\_\_  
Date

Please mail the signed and completed application with check or money order (contact The Foundation before transferring any stock) to:

**The Rotary Foundation of Rotary International**  
**Fund Development/Field Services**  
1560 Sherman Avenue, One Rotary Center  
Evanston, IL 60201 USA (847) 866- 3000