Data Entry Worksheet - Deferred Gift Annuity (55)

Advisor Name: _____ **Firm:** _____

Street Address: _____ **City:** _____ **State:** _____ **ZIP:** _____

Phone: _____ **Fax:** _____ **Email:** _____

Donor(s) Name(s): _____

Gift Date: ____/____/_____
(Date of gift annuity funding)

Gift Annuity Type:　　　　1 Life　　　2 Lives
(Number of beneficiaries)

Name and birth date of each annuitant?
1. _____ DOB___/___/___
2. _____ DOB___/___/___

Payout Date: ____/____/_____
(Date of first gift annuity payment)

Gift Amount: $_____
(Fair market value of property)

Cost Basis: $_____
(Cost basis of property)

Gift Annuity Payout Percent: _____%
(Payout rates are recommended by the ACGA. This rate will be provided by the charity.)

Payment Frequency:
　Annual　　Semi-annual　　Quarterly　　Monthly

Income tax bracket of donor(s)?
　37%　　35%　　32%　　24%　　22%
　12%　　10%　　Other_____

Capital gains rate of donor(s)?
　23.8%　　18.8%　　15%　　Other_____

Title To Contributed Property:
　Separate Property
　Joint Property

Annuity Recipient:
　Donor Receives Annuity
　Donor and Another Person Receive Annuity
　Cash Annuity for Another Person
　Appreciated Property Annuity for Another Person

Alternate Payment Options for Deferred Gift Annuity:

　Flexible Deferred Annuity
　(Donor may elect the payout starting date.)
　Enter age range for starting date. (i.e. 70 to 90)
　　_____ to _____

　College Gift Annuity
　　Term of years payout: _____ (1-10)

　Term of Years Gift Annuity
　　Term of years payout: _____ (1-20)