NEW JERSEY AUDUBON SOCIETY
www.njaudubon.org

Charitable Gift Annuity

Information Request Form

A Charitable Gift Annuity provides you with lifetime annuity payments and your annuity rate is based upon your date of birth. Personalized gift annuity illustrations are available free with no obligation. To receive your own confidential report, which includes the annuity pay-out rate and tax-deductible amounts, simply fill out the information below.

❑ **Yes! I would like to see a detailed gift illustration based upon a gift amount of $_____ (minimum $10,000)**

Lifelong fixed payments would be paid to:

__Me My birthdate: ____/____/____
Month Day Year

__Me and my spouse Spouse's birthdate: ____/____/____
Month Day Year

__To another person(s) 1st birthdate: ____/____/____
Month Day Year

2nd birthdate: ____/____/____
Month Day Year

I would want my annuity payments to be: ____Quarterly ___Semiannually ____Annually
____Monthly (available if your gift is $25,000 or more)

Annuity payments should start: ❑ Now ❑ In _____ years
(Annuitant must be at least age 50 for pay-out to begin...may defer payments for up to 20 years)

If you would like to establish a gift annuity using stock, we will need to know the cost basis (what you paid for the stock) in order to proivde information on capital gains tax savings.

I am considering using _____shares of _____stock.
My cost basis is $_____per share.

Name: _____

Address: _____

_____

City_____ State_____Zip_____

Phone: _____ Please call me between:_____

Complete and return this form and mail, e-mail, or via fax 908-204-8960. If you have any questions, contact John Carno, Vice President for Development, New Jersey Audubon Society, 9 Hardscrabble Road, Bernardsville, NJ 07924, Phone 908-204-8998, e-mail john.carno@njaudubon.org.