

Scottish Rite Foundation
 1733 16th Street, NW
 Washington, DC 20009-3103
 Phone: (202) 232-3579

APPLICATION FOR A ONE OR TWO-LIFE GIFT ANNUITY AGREEMENT

1. I hereby apply for a Gift Annuity in the amount of \$ _____

2. The annuity payments are to be made to:

a. (1) _____
 name address city/state/ZIP

(2) _____
 name address city/state/ZIP

(Name in full: If married, use own name; (ie. Jane Doe, NOT Mrs. John Doe.)

b. 1. Date of Birth (____/____/____) Social Security No. ____-____-____
 (mm/ dd / year)

2. Date of Birth (____/____/____) Social Security No. ____-____-____
 (mm/ dd / year)

c. (Check one) 1-life; 2-lives (in succession); Joint (both) & survivor.

3. The SCOTTISH RITE FOUNDATION, SOUTHERN JURISDICTION, U.S.A., INC., shall make payments....

(Check one) Annually Semi-Annually Quarterly Monthly
 [monthly payments are for gifts of \$15,000 or more only]

4. Payments are to start; Now; In ____ Years. Start in Year ____.

5. Assets given for Annuity owned by: Annuitant (1); (2); both.

6. If this annuity gift was NOT made by above mentioned annuitant(s), please enter name and address of the DONOR(S) here:

7. a. Enclosed is a check, bank draft or money order for \$ _____ payable to the "Scottish Rite Foundation, Southern Jurisdiction, U.S.A., Inc."

b) If funding with securities, describe here. (Use additional paper if needed)

# shares	Company Name	Issued in name of	Date Acquired	Tax Cost basis
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8. Name and address of relative, friend or business acquaintance with whom the Scottish Rite Foundation, Southern Jurisdiction, U.S.A., Inc. can communicate after death of annuitant(s):

name address relationship

9. Remarks and Gift Designation, if any (i.e. LOCAL SCOTTISH RITE FOUNDATION):

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10. Application should be accompanied by photocopy of birth certificate, driver's license or other proof of age.

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11. Date _____ Signed _____
Date _____ Signed _____
(Donor's Signature)
(Donor's Signature)

12. SEND THIS FORM AND GIFT TO: SCOTTISH RITE FOUNDATION, SOUTHERN JURISDICTION, U.S.A., INC. ATTENTION: BARBARA G. GOLDEN, DIRECTOR OF DEVELOPMENT, SCOTTISH RITE FOUNDATION, SOUTHERN JURISDICTION, U.S.A., INC., 1733 16TH STREET, NW, WASHINGTON, DC 20009-3103

A charitable gift annuity is not regulated by the state's Insurance Department and is not protected by a guaranty association affiliated with the Insurance Department.