

Charitable Gift Annuity Application

For the Benefit of Friends House, Inc.

Issued by
 FRIENDS FIDUCIARY CORPORATION
 1650 Arch Street, Suite 1904, Philadelphia, PA 19103

- Type of Gift:* CHARITABLE GIFT ANNUITY
 DEFERRED CHARITABLE GIFT ANNUITY – Date of first annuity payment _____
 FLEXIBLE CHARITABLE GIFT ANNUITY – Years for first annuity payment _____
 Please issue this annuity at a lower payout rate of: _____%

Donor Information

Name		Social Security Number	
Name		Social Security Number	
Street Address		Telephone Number	()
City	State	Zip	

Life Income Beneficiary #1 (if same as donor, please note and insert birth date)

Name		Social Security Number	
Street Address		Telephone Number	()
City	State	Zip	
Birth Date			

Life Income Beneficiary #2

Name		Social Security Number	
Street Address		Telephone Number	()
City	State	Zip	
Birth Date			

Charitable Beneficiary 1: _____ % *Is this gift anonymous?* Y N

Name	Friends House, Inc.	Telephone Number	(301) 924-5100
Contact Person	Karen Lehman, Executive Director		
Street Address	17340 Quaker Lane		
City, State, Zip	Sandy Springs, MD 20860		
Charitable Use	Friends House Residents Assistance Fund		

Please complete all three pages

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Gift Information

Check: Check Number _____ Amount \$ _____

I will wire transfer this gift. Please provide necessary information.

Securities (List below):

I will instruct my broker to transfer this gift. Please provide necessary information.

I will forward physical certificates under separate cover.

Name of Stock/Bond	Number of Shares	Present Value	Date Acquired	Cost Basis
				\$
				\$
				\$
				\$

 Donor Name

 Donor Signature

 Date

 Donor Name

 Donor Signature

 Date

To the Donor: Friends House’s Charitable Gift Annuities are issued through Friends Fiduciary Corporation and managed for your benefit during the life of the annuity. Friends Fiduciary Corporation (FFC) is a non-profit corporation, whose mission is to supply financial services to other Quaker non-profit organizations and Meetings. These services include investment management and planned giving gift administration services. In making this gift, FFC will issue your annuity agreement and make the annuity payments to you, or whomever you designate as the annuitant. At the conclusion of the annuity payments, FFC will distribute the remainder to Friends House, Inc. If you should have any questions, please talk to the development office at Friends House or contact Melissa Stoner, Program Director ~ 215-241-7272 or melissa@friendsfiduciary.org ~ in the FFC office.

Please complete all three pages

Direct Deposit Authorization

- I (we) do not wish to authorize direct deposit at this time.
- I (we) hereby authorize Friends Fiduciary Corporation (FFC) to initiate credit entries and to initiate, if necessary, debit entries and adjustments for any credit entries made in error to my/our (check one):
- Checking Savings

Account as checked above and the depository named below, and to credit and or debit the same to such account.

Bank/Depository Name _____

ACH Credit Routing Number: _____
(Please confirm the ACH Credit Routing number with your bank/depository – This number may be different than the number printed on your checks or deposit slips.)

Account Number _____

Name on the Account _____

This authority is to remain in full force and effect until FFC has received written notification from me (or either of us) of its termination in such time and in such manner as to afford FFC and the Bank/Depository a reasonable opportunity to act upon the request for termination.

Name _____ Signature _____

Name _____ Signature _____

Date _____