

APPLICATION FOR GIFT ANNUITY

Last Name: _____ First Name(s)/Initials: _____

Mailing Address: _____ Postal Code: _____

Date of Birth: _____ S.I.N. _____ Telephone: _____
Day Month Year
(Please attach copy of birth certificate)

Current Congregation: _____ Church Address: _____

Complete for Joint Annuity Only

Surname of Spouse/Sibling: _____ First Name(s): _____

Mailing Address: _____ Postal Code: _____

Date of Birth: _____ S.I.N. _____ Telephone: _____
Day Month Year
(Please attach copy of birth certificate)

Annuity payments are deposited directly to the bank indicated below *(please attach a copy of your voided cheque)*

Bank Name: _____

Bank Address: _____

Account Number: _____ Bank Branch: _____

Frequency of Payments: Semi-Annually: Quarterly: Monthly:

Note: If you selected an option other than the semi-annual payments, the rates may be slightly reduced from those published.

Amount of Annuity \$ _____

Make Cheque Payable to:
The Trustee Board of The Presbyterian Church in Canada

Note: Five percent (5%) of your original gift annuity will be immediately distributed to *Presbyterians Sharing* to help grow the mission and ministries of The Presbyterian Church in Canada. The remaining 95% of your gift will be invested in The Presbyterian Church in Canada's professionally managed Consolidated Portfolio. After the last periodic payment under the gift annuity (i.e. after the death of the donor/s), the residue remaining in the annuity will be distributed directly to the beneficiaries you have designated in this contract. The Presbyterian Church in Canada currently charges 1.0% of the balance in each annuity each year to cover the costs of administering the gift annuity program.

Designation of Gift Annuity – please see reverse

Note 1: The Trustee Board of The Presbyterian Church in Canada encourages donor(s) to seek independent advice concerning this gift annuity.

Note 2: Donors are advised that they have 30 days after signing the Annuity Agreement to change their mind and receive a full refund of capital, after which the contract and gift are irrevocable.

I certify that the above information is correct and I authorize the mailing of an irrevocable and formal agreement.

Dated: _____

Day Month Year

Signature

Designation of Gift Annuity Residue

____ % to *Presbyterians Sharing*

____ % to Presbyterian World Service and Development

____ % to my local congregation (please specify with full church name and address)

Please specify percentage(s) below to the following *Mission Priority Funds* of The Presbyterian Church in Canada

____ % to Growing Churches Fund

____ % to Sustaining Pastoral Excellence Fund

____ % to Partners in Mission Fund

____ % to Creative Ministry with Children and Youth Fund

Percentage(s) to another fund or ministry in The Presbyterian Church in Canada (please specify)

____ % to _____

____ % to _____

100% PLEASE SELECT YOUR DESIGNATION FROM THE ABOVE LIST, ENSURING THAT THE PERCENTAGES TOTAL 100%.

If any of this work does not exist at the time the gift is payable, that designation will be redistributed to *Presbyterians Sharing*.

It is our policy and practice to attach the name of the donor to the gift when the donor is deceased and the gift is realized unless the donor requests anonymity as indicated below:

No, I do not want my name attached when my final gift is disbursed (please initial)

It is our practice, when donors have acquired a gift annuity, to inform their beneficiary(ies) that they can expect a gift in the future. How would you prefer for this information to be shared with your designated beneficiary(ies)?

→ Amount only: (please initial)

→ Name only (please initial)

→ Your name and amount (please initial)

Tell us your story. What does making a gift to The Presbyterian Church in Canada mean to you?

Do not write below this line. For office use only.

Rate and amount of option requested

Form Revised: Oct. 2013

Payment Option	Rate	Amount
Semi-annually	%	\$
Quarterly	%	\$
Monthly	%	\$

Prepared by: _____

Approved by: _____