

Data Entry Worksheet - Immediate Gift Annuity (53)

Advisor Name: _____	Firm: _____		
Street Address: _____	City: _____	State: _____	ZIP: _____
Phone: _____	Fax: _____	Email: _____	
Donor(s) Name(s): _____			

Gift Date: ____/____/____ <small>(Date of gift annuity funding)</small>	
Gift Annuity Type: <small>(Number of beneficiaries)</small>	1 Life 2 Lives
Name and birth date of each annuitant?	
1. _____	DOB ____/____/____
2. _____	DOB ____/____/____
Payout Date: ____/____/____ <small>(Date of first gift annuity payment)</small>	

Gift Amount: \$ _____ <small>(Fair market value of property)</small>
Cost Basis: \$ _____ <small>(Cost basis of property)</small>
Current Return: _____% <small>(Ordinary income currently produced by property, e.g., 2%)</small>
Gift Annuity Payout Percent: _____% <small>(Payout rates are recommended by the ACGA. This rate will be provided by the charity.)</small>
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	

If the annuity is funded with appreciated property, is any of the gain short-term capital gain or ordinary gain? If so, what percentage:
% Short-term Capital Gain _____%
% Ordinary Gain _____%

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