



LCMS Foundation
1333 S. Kirkwood Road
St. Louis, MO 63122-7295
800.325.7912
lcmsfoundation.org

APPLICATION FOR GIFT ANNUITY AGREEMENT
Offered through The Lutheran Church—Missouri Synod Foundation

I/We wish to enter into a Gift Annuity agreement with The Lutheran Church—Missouri Synod Foundation as follows:

- 1. A check in the amount of \$ _____ is enclosed (*payable to "LCMS Foundation"*).
(\$5,000 minimum)
- Securities with the approximate value of \$ _____ (*please contact the Foundation for transfer instructions*).

2a. **Please make payments:** (check one)

- annually semi-annually
- quarterly monthly

2b. **Start my payments:** (check one)

- Now I'll tell you later

If you checked "later," please contact the Foundation about benefits and details of flexible gift annuities.

3. **Payments are to be made for life to:** (*Please print or type*)

RECIPIENT ONE:

Title	Name	
Street Address	City, State	Zip Code
Phone Number	Best time to call	E-mail
Social Security No.	Date of Birth	Relationship to applicant
Home Congregation		City/State

RECIPIENT TWO (if applicable):

Title	Name	
Street Address	City, State	Zip Code
Phone Number	Best time to call	E-mail
Social Security No.	Date of Birth	Relationship to applicant
Home Congregation		City/State

Note: If recipients are husband and wife, the social security number of Annuity Recipient One will be used for tax reporting purposes. Please contact the LCMS Foundation if this is not your preference.

4. **It is understood that the gift portion of the annuity is to be used for the ultimate benefit of:**

_____ % LCMS FOUNDATION

_____ % _____
Organization name

_____ % _____
Organization name

_____ % _____
Organization name

5. **Send me tax information for this gift based on: (check one)**

Highest tax deduction (lower tax-free payments)

Highest tax-free payments (lower tax deduction)

6. **Please check the answer:**

Yes **No** Does this Gift Annuity represent less than 1/5 of your entire estate, not including your house and life insurance?

Yes **No** Have you consulted an attorney regarding this Gift Annuity?

I have read the enclosed insert entitled "What is a Gift Annuity?"

I fully understand that the Gift Annuity Agreement of the LCMS Foundation is irrevocable, that the designated annuity recipient(s) will receive payments for life, and that the remaining gift portion, if any, will be used for the religious, charitable or educational purpose I designated.

Signature of applicant

Date

Signature of applicant

Date

NOTE TO SOUTH DAKOTA RESIDENTS: Charitable Gift Annuities are not regulated by and are not under the jurisdiction of the South Dakota Division of Insurance.

NOTE TO OKLAHOMA RESIDENTS: A charitable Gift Annuity is not regulated by the Oklahoma Insurance Department and is not protected by a guaranty association affiliated with the Oklahoma Insurance department.

Counselor Name: _____