

# Charitable Gift Annuity Application

## SECTION 1—DONOR INFORMATION

### DONOR 1

Same as Annuitant 1

Name (first, middle initial, last):

\_\_\_\_\_

Legal Domicile (state): \_\_\_\_\_

Primary Mailing Address:

\_\_\_\_\_

\_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Birthdate: \_\_\_\_\_

### DONOR 2

Same as Annuitant 2

Name (first, middle initial, last):

\_\_\_\_\_

Legal Domicile (state): \_\_\_\_\_  Same as Donor 1

Primary Mailing Address:  Same as Donor 1

\_\_\_\_\_

\_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Birthdate: \_\_\_\_\_

## SECTION 2—GIFT INFORMATION (Minimum gift amount is \$10,000)

I enclose my check for \$\_\_\_\_\_ payable to Bowdoin College.

I would like to make my gift with a credit card. Please contact me.

I will have the following appreciated securities (held for more than one year) transferred:

Bowdoin College will provide transfer instructions for gift annuities funded with appreciated securities.

Your gift annuity will be valued as of the date the securities arrive in Bowdoin's brokerage account.






# Charitable Gift Annuity Program Disclosure Statement (continued)

## INVESTMENT INFORMATION

It is Bowdoin's present intention to maintain the assets used to fund annuities in a pooled investment fund held separately from other College funds. Investment management and administrative services are presently provided by TIAA Kaspick of Redwood Shores, California, and Boston, Massachusetts. At some point in the future, the College may decide to commingle the annuity assets with its endowment funds.

It is expected that the pool will invest in a diversified portfolio of assets which may include both debt and equity securities in such proportions as seem advisable from time to time in light of current market and economic conditions, as well as other .8 (s w)9.6mS-17.7 (i)-16.3 (f)14.8 (o)9.D 7 >(n)11.8 (t a)-20.6 (x)-29..7 (v)0.9 (en (f)14.