



1428 Broad Street
 Selma, Alabama 36701
 334-872-2359

giftplanning@edmunditemissions.org
www.edmunditemissions.org

**SECURING INCOME FOR YOU AND PROVIDING
 FOR THE POOR IN THE DEEP SOUTH**

I (we) hereby make application for a gift annuity subject to the following terms and conditions.

DONOR(S) INFORMATION:

(Mr./Mrs./Ms./Miss/Rev.) _____	Mr./Mrs./Ms./Miss/Rev.) _____
Name _____	Name _____
SS# _____ DOB _____	SS# _____ DOB _____
Address _____	Address _____
City _____ State _____ Zip _____	City _____ State _____ Zip _____
Daytime Phone (____) _____	Daytime Phone (____) _____
Cell Phone (____) _____	Cell Phone (____) _____
Email Address _____	Email Address _____

ANNUITANT(S) - CHECK ONE (immediate payments for age 60+, deferred payments for age 50+)

- _____ One Annuitant
- _____ Two annuitants, joint-and-survivorship (payments to both jointly, continuing to survivor)
- _____ Two successive annuitants (payments to one, then to the survivor)

ANNUITY PAYMENT RECIPIENT (NAME OF INDIVIDUAL OTHER THAN THE DONOR RECEIVING PAYMENTS)

First Annuitant:

(Mr./Mrs./Ms./Miss/Rev.) _____

Name _____

SS # _____

Relationship to Donor _____ DOB _____

Address _____

City _____ State _____ Zip _____

Daytime Phone (____) _____

Cell Phone (____) _____ Email: _____

Second Annuitant

(Mr./Mrs./Ms./Miss/Rev.) _____

Name _____

SS# _____

Relationship to Donor _____ DOB _____

Address _____

City _____ State _____ Zip _____

Daytime Phone (____) _____

Cell Phone (____) _____ Email: _____

EMERGENCY CONTACT INFORMATION

Name _____

Address _____

City _____ State _____ Zip _____

Daytime Phone (____) _____

Cell Phone (____) _____ Email: _____

Relationship to Donor _____

Name _____

Address _____

City _____ State _____ Zip _____

Daytime Phone (____) _____

Cell Phone (____) _____ Email: _____

Relationship to Donor _____



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CONTRIBUTION

Check amount \$ _____ Check Number _____

[Enclosed, **Made Payable to National Catholic Community Foundation (NCCF)**]

Securities (include details if known: otherwise, estimate fair market value and indicate the cost basis below)
Note: Actual fair market value of securities for calculating the amount of the annuity and tax deduction will be determined when NCCF receives the securities.

Description of Securities (name of security and number of shares) _____

Cost Basis _____ Original date of purchase _____ Est. Fair Market Value _____

ANNUITY TYPE

Payment of the annuity will be:

_____ immediate (min. age 60+) _____ deferred (min. age 50+, first payment deferred to age 60)

INCOME PAYMENT OPTIONS (CHECK ONE)

Please select your annuity payment frequency and your annuity payment type:

Quarterly Semiannually Annually Check

Direct Deposit (complete an ACH authorization form below and include a voided check)

Name	Account Type <input type="checkbox"/> Checking <input type="checkbox"/> Savings
Bank/Depository Name	
Account Number	
ACG Credit Routing Number	

As a beneficiary of the above referenced fund, the undersigned hereby authorizes NCCF to wire, by use of the Automated Clearinghouse System ("ACH"), distributions from the fund directly to the bank account listed above. This authorization shall remain in effect until written notice is given to NCCF by the undersigned.

Signature _____ Date _____

BENEFICIARY

Legal Name: Fathers of St. Edmund, Southern Missions, Inc.
DBA: Edmundite Missions
Address: 1428 Broad Street, Selma, Alabama 36701
Percent of Gift: 100%

I (we) have received the disclosure statement from NCCF regarding its gift annuity reserves and investments, as required under the Philanthropy Protection Act. I (we) understand that a charitable gift annuity is irrevocable and that, at the death of the last annuitant, the portion of my (our) contribution remaining after satisfying the annuity payment obligation will be used by NCCF. **NCCF administers all legal and financial requirements for the Edmundite Missions Charitable Gift Annuity program.**

Signature of Donor(s) _____ Date _____

Return this application to: Edmundite Missions, 1428 Broad Street, Selma, AL 36701. **Attn:** Lisa Quist

Gift Annuity Disclosure Statement

Description of a Gift Annuity

A gift annuity is a simple contract between the donor(s) and National Catholic Community Foundation. In exchange for the donor's(s') contribution, National Catholic Community Foundation promises to make fixed payments for life to one or two annuitants (usually, but not necessarily, the donor(s)). The amount paid is based on the age(s) of the annuitant(s), in accordance with National Catholic Community Foundation's rate schedule.

Not a Commercial Investment

The act of establishing a gift annuity with National Catholic Community Foundation is not, and should not be viewed as, an investment. Rather, it is a way to arrange for annuity payments while making a charitable donation. In this respect, a gift annuity issued by National Catholic Community Foundation is different from a commercial annuity. While both types of annuities make payments that are usually partially tax-free, the charitable donation aspect of establishing a gift annuity may result in additional tax benefits that are not available when purchasing a commercial annuity. These tax benefits include a current federal income tax charitable deduction (if you itemize your deductions) and possible future estate tax savings.

Gift Annuity Rates

Generally, the gift annuity rates paid by National Catholic Community Foundation are those suggested by the American Council on Gift Annuities, which is a national organization of charities that has been in existence since 1927. These rates have been calculated so as to provide attractive payments to the donor and/or other annuitant(s) and also to result in a significant portion of the contribution remaining for the charity. Because a charitable gift is involved, the rates are lower than those available through commercial annuities offered by insurance companies and other financial institutions.

Assets Backing Annuity

The annuity payments are a general obligation of National Catholic Community Foundation, and they are backed by all of our assets (subject to security interests). As of 12/31/2019 the market value of our total invested funds exceeded \$21,005,000.00, and they are invested in stocks and bonds. Assets received by National Catholic Community Foundation for gift annuities are managed internally, in a conservative and disciplined manner. If National Catholic Community Foundation should ever fail financially, individuals entitled to receive annuities will qualify as general creditors of National Catholic Community Foundation.

Governance

Responsibility for governing National Catholic Community Foundation, which was established in Maryland in 1997, is vested in a Board of Trustees composed of 12 persons, who are selected by the Board of Trustees. Common investment funds managed by our organization are exempt from registration requirements of the federal securities laws, pursuant to the exemption for collective investment funds and similar funds maintained by charitable organizations under the Philanthropy Protection Act of 1995 (P.L. 104-62). Information in this statement is provided to you in accordance with the requirements of that Act.

Points to Remember

- A contribution for a gift annuity is irrevocable.
- The right to annuity payments may not be assigned to any person or organization, other than National Catholic Community Foundation.
- The gift date is the date when you actually transfer assets. In the case of cash, it is the date you mail or deliver a check. In the case of an electronic transfer of securities, it is the date they are received into the account of National Catholic Community Foundation. If you have certificates, it is the date they are properly endorsed and mailed or delivered.
- The gift annuity is governed by applicable state laws.

For More Information: This disclosure statement is intended to provide basic information regarding the gift annuities issued by National Catholic Community Foundation, and is not intended to serve as legal advice. We encourage you to consult with your own legal and/or financial advisor about the applicability of such a gift in your own situation. If you have additional questions concerning National Catholic Community Foundation's gift annuity program, please call or write Renee Fusick, 1321 Generals Highway, Suite 202, Crownsville, MD 21032. 410-923-3222.