

**STATEMENT OF INTENT TO FUND
SMITH COLLEGE CHARITABLE GIFT ANNUITY**

This Agreement will serve to confirm my/our intention to make a gift of \$_____ to Smith College for a charitable gift annuity. After the death of the income beneficiary(s), Smith College will direct the remaining principal of the gift toward the following purpose:

- Unrestricted
- Specific designation: _____

This gift is made in honor or in memory of: _____

Annuitant:

This gift annuity is to be a one-life or two-life annuity for the following annuitant(s):

Primary Annuitant:

Legal Name: _____

Date of Birth: _____

Social Security Number: _____

Legal Residence: _____

City/State/Zip: _____

Relationship to Beneficiary: _____

Secondary Annuitant: (only complete this section if funding a two-life gift annuity)

- Successor (pays to survivor after primary annuitant dies – most common when funding assets are in one name only)
- Joint (payments are made in both names – most common when funding assets are jointly owned)

Legal Name: _____

Date of Birth: _____

Social Security Number: _____

Legal Residence: _____

City/State/Zip: _____

Relationship to Benefactor: _____

Annuity Type:

- Immediate payment
- Deferred payment (must be deferred at least 12 months)
Deferred Annuity Payment Start Date: _____

- Flexible Deferred payment (must be deferred at least 12 months)
Earliest Start Date: _____
Latest Start Date: _____

Your tax benefits depend on the prevailing IRS Discount Rate, which is adjusted monthly. You have the right to choose from among the rate in effect in the last three months. Which do you elect to use?

- Maximum available discount rate (higher deduction now, less tax-free income later)
- Minimum available discount rate (lower deduction now, more tax-free income later)

The Grécourt Match:

- Yes, I wish to participate in the Grécourt Match. 10% of my gift will be matched by a current gift from an anonymous member of the Class of 1964 for financial aid (up to a limit of \$10,000).
- No, I do not wish to participate in the Grécourt Match.

Gift Details:

- Enclosed is a check made payable to Smith College
OR
 I would like wire transfer instructions – (Please call 800-526-2023, Option 5)
 I/we have directed my/our broker to transfer the following stock/securities to Smith College:

Broker Name and Contact Information: _____

Stock/Securities to be donated (*name, # of shares, cost basis, donor owned or jointly owned*):

Name: _____ # of Shares _____

Cost Basis: _____
(*if using multiple stocks, please indicate cost basis for each stock*)

- Donor Owned OR Jointly Owned

The Smith Fund:

- I have already made my gift to the Smith Fund (annual fund) this fiscal year (July 1 through June 30.)
 I wish to remain on the Smith Fund (annual fund) appeal list for the remainder of this fiscal year (July 1 through June 30.)
 I consider this gift annuity to be my only gift to Smith this fiscal year, and do not wish to receive further Smith Fund (annual fund) appeals until after June 30.

The Grécourt Society:

- I am already a member of The Grécourt Society.
 With this gift I agree to be a listed member of The Grécourt Society.
 I am making this gift anonymously. I wish to be a listed member of The Grécourt Society.
 I am making this gift anonymously and wish to be an anonymous member of The Grécourt Society.
 Please check here if you are making this gift from jointly owned assets and your partner would like to become a member as well. They will be as you are, listed or anonymous.
 Yes No I would like to receive a Grécourt lapel pin.

Estate/Next of Kin Contact Information:

Whom should Smith contact upon your death (or that of the survivor beneficiary if applicable) to facilitate the termination of your gift annuity?

- Executor Trustee Family Member Other

NAME _____

BUSINESS _____

ADDRESS _____ CITY _____ STATE _____ ZIP _____

EMAIL _____ PHONE _____

Name (Printed)

Donor's signature

Date

Please return this form to: Kamlyn Allman, Office of Gift Planning, Smith College, 8 Bedford Terrace, Northampton, MA 01063