

# Annuity Application

(minimum gift: \$10,000)

# Heifer International Foundation

P.O. Box 727 • Little Rock, Arkansas 72203 • (888) 422-1161

I / We hereby apply for a (check one):  One-Life Annuity  Two-Life Annuity  Deferred Annuity  
in the amount of \$ \_\_\_\_\_

## DONOR

Title \_\_\_\_\_ Full Legal Name \_\_\_\_\_  
(If a married woman, please use your own name: Mrs. Eliza Ann Smith, rather than Mrs. John G. Smith)

Address \_\_\_\_\_  
Number and Street City State Zip

Birth Date \_\_\_\_/\_\_\_\_/\_\_\_\_ Gender  M  F Social Security \_\_\_\_/\_\_\_\_/\_\_\_\_  
month day year

Phone \_\_\_\_\_ Email \_\_\_\_\_

## INCOME RECIPIENT NO. 1 (if other than donor)

Title \_\_\_\_\_ Full Legal Name \_\_\_\_\_  
(If a married woman, please use your own name: Mrs. Eliza Ann Smith, rather than Mrs. John G. Smith)

Address \_\_\_\_\_  
Number and Street City State Zip

Birth Date \_\_\_\_/\_\_\_\_/\_\_\_\_ Gender  M  F Social Security \_\_\_\_/\_\_\_\_/\_\_\_\_  
month day year

Phone \_\_\_\_\_ Email \_\_\_\_\_

\* Full legal name of parent or guardian if recipient is a minor: \_\_\_\_\_

## INCOME RECIPIENT NO. 2 (if applicable)

Title \_\_\_\_\_ Full Legal Name \_\_\_\_\_  
(If a married woman, please use your own name: Mrs. Eliza Ann Smith, rather than Mrs. John G. Smith)

Address \_\_\_\_\_  
Number and Street City State Zip

Birth Date \_\_\_\_/\_\_\_\_/\_\_\_\_ Gender  M  F Social Security \_\_\_\_/\_\_\_\_/\_\_\_\_  
month day year

Phone \_\_\_\_\_ Email \_\_\_\_\_

Relationship of No. 1 to No. 2 (if any) \_\_\_\_\_

## INCOME PAYMENTS

Income payments are requested:  annually  semi-annually  quarterly

- It is understood that annuity payments will be made to Income Recipient No. 1 listed above as long as that person lives and then, if this is a two-life annuity, to Income Recipient No. 2 should he (or she) survive No. 1.

First payment date if Deferred Annuity: \_\_\_\_\_

## FUNDING OF ANNUITY

Check enclosed for \$ \_\_\_\_\_ (please make payable to Heifer Foundation)

Stock gift of \_\_\_\_\_ (transfer instructions on reverse side)

Number of shares: \_\_\_\_\_ Date Transferred \_\_\_\_/\_\_\_\_/\_\_\_\_ Amount \$ \_\_\_\_\_  
Month day year

It is our policy to transfer the charitable remainder of the annuity at maturity to a named endowment in honor of the donor. Please indicate if this is your desire  Yes  No, funds shall go to: \_\_\_\_\_

*Signature required on reverse side*

## CONTACT INDIVIDUAL

Please provide contact information for a relative or friend with whom the Foundation may communicate if necessary.

Title \_\_\_\_\_ Full Legal Name \_\_\_\_\_

Address \_\_\_\_\_  
Number and Street City State Zip

Phone \_\_\_\_\_ Email \_\_\_\_\_

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## SIGNATURE

\_\_\_\_\_  
Donor's Signature

\_\_\_\_\_  
Date

### **Heifer International Foundation**

The Board of Heifer Project International established Heifer International Foundation in 1990 for the purpose of managing charitable annuities, trusts and bequests and building an endowment to support the work of Heifer Project. The Foundation's Board is comprised of 9 Trustees who are responsible for governing the work of the Foundation.

Annuity payments to you are a general obligation of Heifer International Foundation and are backed by all of its assets. As of December 31, 2007, the Foundation's net assets exceeded \$53 million. These assets are invested in stocks, government and corporate bonds, money market and mutual funds. A portion of these assets are held in a separate gift annuity reserve valued at over \$7.8 million and invested in accordance with state law. Charitable gift annuities typically pay less than commercial annuities.

Common investment funds managed by Heifer International Foundation 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). This information is provided to you in accordance with the requirements of that Act. Please consult with an accountant or legal advisor about your specific situation.

### **Instructions for Transfer of Stocks, Bonds, or Mutual Funds**

#### **WIRE TRANSFER**

If the stock certificates are being held in "street name" at your brokerage firm, you may instruct your broker to have them wire transferred to us at: **Smith Barney DTC #0418, Heifer International Foundation, Account #165-06975-17-255**

Ask your broker to phone Heifer International Foundation at 888-422-1161 when the transfer is completed so we can ensure that the securities have been received.

#### **CERTIFICATE TRANSFER**

If you have the stock certificates in your possession, take them to a broker or banker to obtain a "MEDALLION GUARANTEE" of your signature(s). Also on the back of the certificates, fill in the following information:

- Write "Smith Barney" in the space just in front of or above "attorney"
- In the presence of the broker or banker, date and sign at the "X" exactly as your name(s) appear on the face of the certificate.
- Have your bank or broker affix the "MEDALLION GUARANTEE".
- Call Heifer International Foundation or go to [www.heiferfoundation.org](http://www.heiferfoundation.org) for a Letter of Authorization to Transfer Assets for each certificate, copies are acceptable. Sign in presence of Notary Public and have him/her affix seal.
- Mail the certificates and accompanying forms via REGISTERED mail to Heifer International Foundation, P.O. Box 727, Little Rock, AR 72203-0727.

#### **Heifer International Foundation IRS Identification Number is: #71-0699939**

#### **Disclaimer:**

Heifer International Foundation and its employees are not engaged in rendering legal or tax advice. The content provided is for general information purposes only. Advice and assistance on specific cases should be obtained from attorneys or other professional counsel. Be aware of tax revisions. Because individual state laws govern charitable gifts, wills and trusts, the advice of an attorney should be sought when considering one of these gifts.