



# Environmental Defense Fund Charitable Gift Annuity Application Form

**DONOR NAME:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_

**CITY:** \_\_\_\_\_ **STATE:** \_\_\_\_\_ **ZIP:** \_\_\_\_\_

**PHONE:** \_\_\_\_\_ (Home or Mobile)

**EMAIL:** \_\_\_\_\_

**DATE OF BIRTH:** \_\_\_\_/\_\_\_\_/\_\_\_\_

**SOCIAL SECURITY NUMBER** \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

**DONOR NAME:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_

**CITY:** \_\_\_\_\_ **STATE:** \_\_\_\_\_ **ZIP:** \_\_\_\_\_

**PHONE:** \_\_\_\_\_ (Home or Mobile)

**EMAIL:** \_\_\_\_\_

**DATE OF BIRTH:** \_\_\_\_/\_\_\_\_/\_\_\_\_

**SOCIAL SECURITY NUMBER** \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

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*Applicable if different than the donor/s, otherwise leave blank:*

**ANNUITANT NAME** \_\_\_\_\_

**ADDRESS** \_\_\_\_\_

**CITY** \_\_\_\_\_ **STATE** \_\_\_\_\_ **ZIP** \_\_\_\_\_

**PHONE** \_\_\_\_\_ **EMAIL** \_\_\_\_\_

**DATE OF BIRTH:** \_\_\_\_\_

**SOCIAL SECURITY NUMBER** \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

**ANNUITANT NAME** \_\_\_\_\_

**ADDRESS** \_\_\_\_\_

**CITY** \_\_\_\_\_ **STATE** \_\_\_\_\_ **ZIP** \_\_\_\_\_

**PHONE** \_\_\_\_\_ **EMAIL** \_\_\_\_\_

**DATE OF BIRTH** \_\_\_\_\_

**SOCIAL SECURITY NUMBER** \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

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**Amount of Gift:** \$ \_\_\_\_\_

**Type of Charitable Gift Annuity Payout**

- Immediate
- Deferred      Number of Years: \_\_\_\_\_

**Funds**

- Cash
- Securities      Cost Basis: \_\_\_\_\_

**Payment**

- Monthly
- Quarterly
- Semi Annually
- Annually

**Do you plan to itemize your deductions or take the standard deduction in 2018 for your federal income tax?**

- Itemize deductions
- Take standard deduction

*Please sign below to acknowledge that the information you've provided on this form is complete and accurate.*

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Donor 1 \_\_\_\_\_ Date \_\_\_\_\_

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Donor 2 (if applicable) \_\_\_\_\_ Date \_\_\_\_\_

***Please complete and return this form with your check payable to Environmental Defense Fund and a valid copy of your state issued ID or passport to.***

Environmental Defense Fund  
Office of Planned Giving  
257 Park Avenue South, Floor 17  
New York, NY 10010

Contact us toll-free at 877-677-7397 or [legacy@edf.org](mailto:legacy@edf.org) with any questions you may have or for a personal charitable gift annuity proposal. We recommend that you consult with your financial or legal advisor as you consider this gif