

Swarthmore College Gift Annuity Information Form



1. Donor name(s) _____
2. Donor address _____
3. Donor phone number _____ e-mail _____
4. Amount of gift (\$10,000 minimum) _____
5. Payment start date _____ immediate or _____ defer payments to _____
(Note: All beneficiaries must be at least 65 when payments begin.)
6. Type of asset _____ cash _____ appreciated securities

Note: If gift of cash, the date of the gift is the postmark date on the envelope in which the check is mailed or the date the check is physically delivered to Swarthmore College (if not sent via USPS). If this gift is of securities, the date of gift will be the date the securities arrive in Swarthmore's account. Be sure that the securities have appreciated in value. Contact the Office of Gift Planning (866-526-4438) for specific transfer instructions.

7. If giving appreciated securities, please provide the required information in the chart below:

Name of Security	Number of Shares	Approx. Acquisition Date	Cost Basis

8. If there is more than one donor, please note whether the asset being given is owned by both donors or note the name of the sole owner. This answer may impact the taxation of payments. If you have questions please call us.

Asset owned by: _____ both donors or _____ one donor _____
(donor's name)

9. My gift shall be used: _____ where the need is greatest or for the following purpose: _____

10. Beneficiary #1 Information (Note: This is usually the donor.)

Name: _____ Relationship to donor(s): _____
 Address: _____
 Date of birth: _____ Social security number: _____

11. Beneficiary #2 Information (if there is a second beneficiary)

If two beneficiaries, income payments are to be made (check one):

_____ jointly, then to survivor or _____ to beneficiary #1, then, if living, to beneficiary #2

Name: _____ Relationship to donor(s): _____
 Address: _____
 Date of birth: _____ Social security number: _____

I/We acknowledge that I/we have received the Swarthmore College Gift Annuity Disclosure Statement.

Date: _____ Donor signature(s): _____