

# DEFERRED GIFT ANNUITY APPLICATION



Application for a Dallas Seminary Foundation Deferred Gift Annuity is hereby made to Dallas Seminary Foundation of Dallas, Texas, based on the transfer of the following listed cash or securities to Dallas Seminary Foundation:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

The Agreement is to be issued in the name(s) of:

Name \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Phone \_\_\_\_\_ Email \_\_\_\_\_  
Social Security number \_\_\_\_\_  
Birthdate \_\_\_\_\_ Place of Birth \_\_\_\_\_  
 U.S. Citizen  Other \_\_\_\_\_

Name \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Phone \_\_\_\_\_ Email \_\_\_\_\_  
Social Security number \_\_\_\_\_  
Birthdate \_\_\_\_\_ Place of Birth \_\_\_\_\_  
 U.S. Citizen  Other \_\_\_\_\_

**CERTIFICATION OF BIRTH WILL BE NEEDED.** Please enclose with application. See attached list of acceptable documents.

*A Charitable Gift Annuity is a simple contract between you and Dallas Seminary Foundation.*

*In exchange for your irrevocable gift of cash, securities, or other assets, Dallas Seminary Foundation agrees to pay one or two annuitants a fixed sum each year for life, with payments starting at least one year after your gift. The older the designated annuitants are at the time of the gift and the longer payments are deferred, the greater the fixed payments Dallas Seminary Foundation is able to pay.*

*In most cases a portion of each payment is tax-free, increasing each payment's after-tax value.*

*You decide whether to receive your payments quarterly, semiannually, or annually.*

3909 Swiss Avenue  
Dallas, Texas 75204  
214-887-5190  
Fax 214-887-5519  
foundation@dts.edu

[www.dallaseminaryfoundation.org](http://www.dallaseminaryfoundation.org)

# DEFERRED GIFT ANNUITY CONTINUED...

I (we) understand that the amount of the annuity will be based on the value of the securities on the date of transfer. The annuity payments should be deferred until this date: \_\_\_\_\_ . The annuity payments are to be made  annually,  semiannually,  quarterly, for as long as I (either of us) live(s). I (we) understand the current annuity rate for my (our) age(s) is \_\_\_\_\_ .

Contact *Dallas Seminary Foundation* at (214)-887-5190 for current rates.

I (we) understand these funds may not be withdrawn since this gift is a complete transfer of funds to Dallas Seminary Foundation, Dallas, Texas, for use by Dallas Theological Seminary in the furtherance of its mission and purposes.

The Foundation hereby certifies, and Donor(s) hereby acknowledge, that this qualified charitable gift annuity is not insurance under the laws of the State of Texas, nor is it subject to regulation by the Texas Department of Insurance, nor is it protected by a guaranty association affiliated with the Department of Insurance.

The payments are to be sent to the following address:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

The following is the name, address, and telephone number of someone who will know how to reach me (us) in the event Dallas Seminary Foundation has difficulty in making contact with me (us).

Name _____	
Address _____ _____	
Phone _____	Email _____

_____ Donor Signature	_____ Donor Signature
Date _____	Date _____

# CERTIFICATION OF BIRTH INFORMATION

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A certification of birth may be obtained through any of the following means:

1. A certificate of birth from vital statistics records, made at or about the time of birth.
2. A certificate of baptism from church or parish records, made at an early age.
3. A legally certified copy of the entire page of the family Bible on which the date of birth appears, together with a statement as to when and by whom the entry was made.
4. A school record.
5. A confirmation record, if date of birth or age is shown.
6. A certificate of marriage, if date of birth or age is shown.
7. A naturalization record, if date of birth or age is shown.
8. A passport, at least five years old, if date of birth or age is shown.
9. A military discharge paper, if date of birth or age is shown.
10. A life insurance record under a policy issued at least five years ago.
11. A copy of your voter's registration form.
12. A copy of your driver's license.

If none of the above is available, a detailed statement as to the effort made to secure such evidence should be submitted with the application, then further instructions as to the evidence acceptable for consideration will be given.