



4. **It is understood that the gift portion of the annuity is to be used for the ultimate benefit of:**

\_\_\_\_\_ % Trinity Lutheran Church

\_\_\_\_\_ %  
Organization name

\_\_\_\_\_ %  
Organization name

\_\_\_\_\_ %  
Organization name

5. **Send me tax information for this gift based on: (check one)**

Highest tax deduction (lower tax-free payments)

Highest tax-free payments (lower tax deduction)

6. **Please check the answer:**

Yes  No Does this Gift Annuity represent less than 1/5 of your entire estate, not including your house and life insurance?

Yes  No Have you consulted an attorney regarding this Gift Annuity?

I have read the enclosed insert entitled "What is a Gift Annuity?"

I fully understand that the Gift Annuity Agreement of the LCMS Foundation is irrevocable, that the designated annuity recipient(s) will receive payments for life, and that the remaining gift portion, if any, will be used for the religious, charitable or educational purpose I designated.

\_\_\_\_\_  
Signature of applicant

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of applicant

\_\_\_\_\_  
Date

**NOTE TO SOUTH DAKOTA RESIDENTS:** Charitable Gift Annuities are not regulated by and are not under the jurisdiction of the South Dakota Division of Insurance.

**NOTE TO OKLAHOMA RESIDENTS:** A charitable Gift Annuity is not regulated by the Oklahoma Insurance Department and is not protected by a guaranty association affiliated with the Oklahoma Insurance Department.



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