



BOYS RANCH
FOUNDED BY CAL FARLEY

Charitable Gift Annuity Application

Cal Farley's Boys Ranch Foundation

600 SW 11th Street, Amarillo, Texas 79101 • Phone: (800) 687-3722

I (we) hereby make application for a gift annuity subject to the following terms and conditions:

DONOR(S) INFORMATION

Enter both names if property is jointly-owned or community property; otherwise enter only one name.

Name: _____ Name: _____

Address: _____ Address: _____

City: _____ State: _____ ZIP: _____ City: _____ State: _____ ZIP: _____

Daytime phone: (____) _____ Daytime phone: (____) _____

SS#: _____ Date of birth: _____ SS#: _____ Date of birth: _____

Place of birth: _____ Place of birth: _____

ANNUITANT(S) INFORMATION

Check one:

- One annuitant
- Two annuitants, joint-and-survivorship (payments to both jointly, continuing to the survivor)
- Two successive annuitants (payments to one, then to the survivor)

If annuitant(s) is (are) other than the donor(s), complete the following:

First annuitant: _____ Date of birth: _____

Street address: _____ City: _____ State: _____ ZIP: _____

Social Security No.: _____ Relationship to donor: _____

Second annuitant: _____ Date of birth: _____

Street address: _____ City: _____ State: _____ ZIP: _____

Social Security No.: _____ Relationship to donor: _____

ASSETS FUNDING CHARITABLE GIFT ANNUITY

Cash or Check: \$ _____

(\$10,000 minimum, payable to Cal Farley's Boys Ranch Foundation)

Securities:

Description: _____ No. of shares/units: _____

Date of Acquisition: _____ Cost basis: \$ _____

Estimated fair market value: \$ _____

NOTE: Actual fair market value of securities for calculating the amount of the annuity and for calculating the charitable income tax deduction will be determined when the securities are considered received by Cal Farley's Boys Ranch Foundation. Generally, the fair market value of securities will be the average of the high and low trading price for the securities on the date securities are determined received by Cal Farley's Boys Ranch Foundation.

NOTE: Generally, marketable securities are acceptable for funding a charitable gift annuity. However, because of the potential complexity of securities, all securities must be pre-approved by Cal Farley's Boys Ranch Foundation before acceptance or transfer. Please call Travis McClure at 800-687-3722, Ext. 2543 for assistance with securities.

Total estimated value of all assets contributed to fund annuity: \$ _____

ANNUITY OPTIONS

Payment Frequency (Check one): Annually Semi-annually Quarterly Monthly

Selection of IRS Discount Rate (Check one): Highest rate Lowest rate

NOTE: Each month the IRS provides the required discount rate for calculating the amount of the charitable donation for funding a charitable gift annuity and for calculating the tax-exempt portion of each annuity payment. Taxpayers may choose from three IRS discount rates, the current month rate and the rates for the two previous months. Generally, a higher discount rate increases the amount of the charitable donation and lowers the tax-exempt portion of each annuity payment; and a lower discount rate decreases the amount of the charitable donation and increases the tax-exempt portion of each annuity payment. The IRS discount rate has no impact on the total amount of annuity payments, regardless of which rate the taxpayer chooses. It is recommended that you consult with your tax advisor to determine whether a higher or lower discount rate is best for you.

Payment method: Direct Deposit (ACH)

Please complete and sign Direct Deposit Authorization at end of this application and attach a voided check.

I (we) have received the Disclosure Statement from Cal Farley's Boys Ranch Foundation regarding its gift annuity reserves and investments, as required under the Philanthropy Protection Act. I (we) understand that a charitable gift annuity is irrevocable and that this application is an inseparable part of the Gift Annuity Agreement that I (we) will receive from Cal Farley's Boys Ranch Foundation at a later date.

I (we) understand that immediately upon acceptance, the charitable gift value of this annuity will be used by Cal Farley's Boys Ranch Foundation for its charitable purposes and that, subsequently, at the death of the last annuitant, or other date specified in the Gift Annuity Agreement, the portion of my (our) contribution remaining, after satisfying the annuity payment obligation, will also be used by Cal Farley's Boys Ranch Foundation for its charitable purposes.

I (we) understand that the effective date for this charitable gift annuity will be the later of the postmark or hand delivery date of a completed and signed application, or the date determined by Cal Farley's Boys Ranch Foundation following IRS income tax requirements for the particular assets funding the gift annuity.

I affirm that the statements in this application are true and correct, and that Cal Farley's Boys Ranch Foundation may rely upon these statements in determining the correct payment rate for the annuitant(s).

Signature of Donor(s): _____ Date: _____
_____ Date: _____

DIRECT DEPOSIT AUTHORIZATION

I (we) hereby wish to have my (our) annuity payment(s) deposited directly to my (our) Bank Account. I (we) have enclosed with this application a voided check for the account to which payments are to be deposited.

Account Number: _____ Name of Bank: _____
Branch: _____ City: _____ State: _____
Routing No. (ABA): _____ Phone: (_____) _____

Type of account: (Check one) Checking Savings

Signature: _____ Spouse's Signature: _____
(if gift also made by spouse)