



Charitable Gift Annuity Application

Thank you for taking a few minutes to complete the following form. If you have any questions, or would like us to send you a copy of this form, please do not hesitate to call us via toll-free telephone at 866-803-0389 or email GregBaker@rcgf.org.

Print out and complete this Application form, providing all the requested information including a W-9 and a copy of the driver's license or birth certificate for **each donor and annuitant**. Please fax to 877-222-1829 or send the completed copy to:

Renaissance Charitable Foundation Inc.
6100 W. 96th Street, Suite 105
Indianapolis, IN 46278

FIRST ANNUITANT INFORMATION

Annuitant Name: _____	Phone: _____
Street Address: _____	Email: _____
City: _____	Birthdate: _____
State and Zip: _____	SSN: _____
Relationship to First Donor: _____	Gender: _____

SECOND ANNUITANT INFORMATION

Annuitant Name: _____	Phone: _____
Street Address: _____	Email: _____
City: _____	Birthdate: _____
State and Zip: _____	SSN: _____
Relationship to First Donor: _____	Gender: _____

GIFT INFORMATION

Describe the Asset: _____	FMV: \$ _____
_____	Basis: \$ _____

If Two Annuitants, payments will be made: <input type="checkbox"/> Jointly, OR <input type="checkbox"/> At first, only to the first annuitant and then only to the second annuitant.	Quarterly Payment Frequency: SemiAnnual Annual
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Please select one: <input type="checkbox"/> The donor wants a higher income tax deduction. OR <input type="checkbox"/> The annuitant wants payments that are more tax-advantaged.
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DONOR INFORMATION

Donor Name: _____ Phone: _____
Street Address: _____
City: _____
State and Zip: _____
Relationship to
First Annuitant: _____

SECOND DONOR INFORMATION

Donor #2 Name: _____ Phone: _____
Street Address: _____
City: _____
State and Zip: _____
Relationship to
First Annuitant: _____

ADVISOR INFORMATION

Advisor Name: _____ Phone: _____
Street Address: _____ Email: _____
City: _____
State and Zip: _____

I (we) intend to create a charitable gift annuity with Renaissance Charitable Foundation Inc. (Foundation). I (we) understand that this document is an application and not a gift annuity contract. I (we) further understand that I am (we are) making a charitable gift and that this gift will be **irrevocable** once it has been accepted by the Foundation. The lifetime annuity payments made to each annuitant named in the signed CGA Contract will be based on the value of the assets when accepted by the Foundation.

Signature of Donor #1

Signature of Donor #2

Please note that Renaissance Charitable Foundation Inc. cannot issue Charitable Gift Annuity contracts in all states. For a list of the current states, please see www.RCGF.org/docs/RCF-CGA-map.pdf.



Last updated: July 2010

Required Disclosure to Donors Considering a Charitable Gift Annuity (CGA) with Renaissance Charitable Foundation Inc.

Thank you for considering a charitable gift annuity (CGA) with Renaissance Charitable Foundation Inc. With a gift annuity, you simultaneously make a charitable gift and provide guaranteed payments for life to someone. Most CGA donors retain the lifetime guaranteed payments for themselves as the only beneficiary. Many CGA donors also include their spouse as a payment beneficiary. It is important to note that if someone other than the donor or donor's spouse is a payment beneficiary, there could be significant income, gift and estate tax complications.

The fact that you are making a charitable gift may entitle you to income, gift and estate tax deductions. However, because a charitable gift is involved, the annuity rates offered by Renaissance Charitable Foundation Inc. are lower than those available through commercial annuities offered by insurance companies and other financial institutions. Please note also that Renaissance Charitable Foundation cannot issue CGAs to residents in some states.

CGA payments under a contract with Renaissance Charitable Foundation Inc. are a general obligation of our organization and they are backed by all of our assets. As of December 31, 2009, our total assets exceeded \$200,000,000 in market value. Our audited financial statements are available on request. We invest these assets mainly in a wide variety of publicly-traded stocks, bonds, mutual funds, and CDs but also in some annuity contracts, life insurance policies and closely-held businesses. Sometimes, we invest CGA donations in reinsurance contracts to add a measure of safety both for our CGA annuitants and us but we may sometimes also invest CGA donations in a portfolio of stocks, bonds, mutual funds and federal obligations in accordance with our Investment Policy.

Renaissance Charitable Foundation Inc. was established in December 2000 in Indianapolis, Indiana. Responsibility for governing the organization is vested in its Board of Directors, which conducts a formal meeting each quarter.

Common investment funds managed by our organization are exempt from registration requirements of the federal securities laws, pursuant to the exemption for collective investment funds and similar funds maintained by charitable organizations under the Philanthropy Protection Act of 1995 (P.L. 104-62). Information in this letter is provided to you in accordance with the requirements of that Act.

We would be pleased to provide any additional information at your request.

Gregory W. Baker, J.D., ChFC[®], CFP[®], CAP
President
Renaissance Charitable Foundation Inc.

Request for Taxpayer Identification Number and Certification

Give form to the requester. Do not send to the IRS.

Print or type See Specific Instructions on page 2.	Name (as shown on your income tax return)	
	Business name, if different from above	
	Check appropriate box: <input type="checkbox"/> Individual/Sole proprietor <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Limited liability company. Enter the tax classification (D=disregarded entity, C=corporation, P=partnership) ▶ <input type="checkbox"/> Exempt payee <input type="checkbox"/> Other (see instructions) ▶	
	Address (number, street, and apt. or suite no.)	Requester's name and address (optional)
	City, state, and ZIP code	
	List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on Line 1 to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Social security number
or
Employer identification number

Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below).

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. See the instructions on page 4.

Sign Here	Signature of U.S. person ▶	Date ▶
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

Note. If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:

- The U.S. owner of a disregarded entity and not the entity,