

**Heifer International Foundation**  
**Annuity Application**  
*(Minimum Gift \$10,000)*



I / We hereby apply for a (check one):  One-Life Annuity  Two-Life Annuity  Deferred Annuity

In the amount of \$ \_\_\_\_\_

**Donor**

Title \_\_\_\_\_ Full Legal Name \_\_\_\_\_

*If a married woman, please use your own name (Mrs. Ann Smith), rather than Mrs. John Smith*

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_ Gender  M  F Social Security # \_\_\_\_/\_\_\_\_/\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

**Income Recipient No. 1** (If other than donor)

Title \_\_\_\_\_ Full Legal Name \_\_\_\_\_

*If a married woman, please use your own name (Mrs. Ann Smith), rather than Mrs. John Smith*

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Date of Birth\* \_\_\_\_/\_\_\_\_/\_\_\_\_ Gender  M  F Social Security # \_\_\_\_/\_\_\_\_/\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Full legal name of parent or guardian if recipient is a minor \_\_\_\_\_

**Income Recipient No. 2** (If applicable)

Title \_\_\_\_\_ Full Legal Name \_\_\_\_\_

*If a married woman, please use your own name (Mrs. Ann Smith), rather than Mrs. John Smith*

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Date of Birth\* \_\_\_\_/\_\_\_\_/\_\_\_\_ Gender  M  F Social Security # \_\_\_\_/\_\_\_\_/\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Relationship of No. 1 to No. 2 (if any) \_\_\_\_\_

***\*Each annuitant must be at least 60 years of age (1) for an immediate payment gift annuity, or (2) when payments begin for a deferred annuity.***

**Income Payments**

Income payments are requested:  annually  semi-annually  quarterly

It is understood that annuity payments will be made to Income Recipient No. 1 listed above as long as that person lives and then, if this is a two-life annuity, to Income Recipient No. 2 should he (or she) survive No. 1.

First payment date, if Deferred Annuity: \_\_\_\_\_

## Funding of Annuity

Check enclosed for \$ \_\_\_\_\_ (please make payable to Heifer Foundation)

Stock gift of \_\_\_\_\_

Number of shares \_\_\_\_\_ Date Transferred \_\_\_\_/\_\_\_\_/\_\_\_\_ Amount \$ \_\_\_\_\_

### Transfer Information for your broker:

**DTC #: 0015**

**Firm Name: Morgan Stanley**

**Account Number: 307-053829**

**Account Name: Heifer International Foundation**

## Contact Individual

Please provide contact information for a relative or friend who the Foundation may contact if necessary.

Title \_\_\_\_\_ Full Legal Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

## GIFT ANNUITY DISCLOSURE STATEMENT

The board of Heifer Project International established Heifer International Foundation in 1990 for the purpose of managing charitable annuities, trusts and bequests and building an endowment to support the efforts of ending hunger and poverty and caring for the Earth. The Heifer International Foundation board is comprised of nine trustees who are responsible for governing the work of Heifer International Foundation. The trustees are elected for a three-year term which is renewable for one additional term of three years.

A Heifer International Foundation gift annuity agreement is an irrevocable contract between the donor and Heifer International Foundation. Annuity payments are a general obligation of our organization, and are backed by assets of Heifer International Foundation. As of June 30, 2017, the Foundation's assets totaled over \$133 million, with endowments totaling about \$104 million; \$28 million in trust and annuity funds. These assets are invested in stocks, government and corporate bonds, money market and mutual funds. A portion of these assets are held in a separate gift annuity reserve valued at over \$7.6 million and invested in accordance with state law. Charitable gift annuities typically pay less than commercial annuities. If Heifer International Foundation should ever fail financially, individuals entitled to receive annuity payments from Heifer International Foundation would have sole claim to these accounts. In addition, they would qualify as general creditors of Heifer International Foundation to the extent this account did not fully cover all annuity obligations.

Common investment funds managed by Heifer International Foundation 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). This information is provided to you in accordance with the requirements of that Act. Please consult with an accountant or legal advisor about your specific situation.

**Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

Please return this form to:  
Heifer Foundation  
PO Box 727 Little Rock, AR 72203

Questions? Contact us at:  
Tel: (888) 422-1161, Fax: (501) 907-4902  
Email: [info@heiferfoundation.org](mailto:info@heiferfoundation.org)  
[www.heiferfoundation.org](http://www.heiferfoundation.org)