



# The San Diego Foundation

A foundation for your passion

## DONOR INFORMATION FORM FOR CHARITABLE GIFT ANNUITIES

I. Donor Information Income Beneficiary? Yes \_\_\_ No \_\_\_

1. Name \_\_\_\_\_  
Address \_\_\_\_\_  
City/State/Zip \_\_\_\_\_  
Phone \_\_\_\_\_ SSN# \_\_\_\_\_ DOB \_\_\_\_\_

Income Beneficiary? Yes \_\_\_ No \_\_\_

2. Name \_\_\_\_\_  
Address \_\_\_\_\_  
City/State/Zip \_\_\_\_\_  
Phone \_\_\_\_\_ SSN# \_\_\_\_\_ DOB \_\_\_\_\_

II. Contract Information

3. Amount of Gift: \_\_\_\_\_

4. Type of Gift: Cash \_\_\_ Stock \_\_\_ Bonds \_\_\_

Cost Basis \_\_\_\_\_

5. Frequency of payment: Quarterly Semi-Annually Annually (circle one)

6. Direct Deposit: Yes \_\_\_ No \_\_\_

7. If no, where should payment be mailed?: \_\_\_\_\_