

## SECURITIES

If funding with securities, describe here (**required**). Use additional paper if needed:

Number of Shares \_\_\_\_\_

Company Name \_\_\_\_\_

Issued in Name of \_\_\_\_\_

Date Acquired \_\_\_\_\_

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

Please make a friend/relative/attorney/business associate aware of your annuity arrangement and request that the SPLC be notified at the time of your death. Please provide names and addresses of people with whom the Southern Poverty Law Center should communicate after Annuitant's death or if Annuitant(s) cannot be located:

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_ Telephone \_\_\_\_\_

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_ Telephone \_\_\_\_\_

## REQUIRED DISCLOSURE

It is important to the Southern Poverty Law Center and to our State governments that you fully understand that the payments made under a Charitable Gift Annuity are backed only by the full faith and credit of the organization and are not insured or guaranteed by an insurance company or backed in any way by the State of

\_\_\_\_\_  
(Please insert your state of residence.)

Your state's Department of Insurance has neither approved nor disapproved of the gift annuity being offered, nor has it reviewed the information provided to determine its accuracy or completeness.

Gift annuity payments are a general obligation of the SPLC and are backed by all of its assets, including our full endowment and segregated gift annuity reserve fund which is invested in accordance with the laws of all states that regulate charitable gift annuities.

I understand this enclosed disclosure statement and choose to contract a charitable gift annuity with the Southern Poverty Law Center based on its written terms of agreement:

Donor's Signature \_\_\_\_\_ Date \_\_\_\_\_

Donor's Signature \_\_\_\_\_ Date \_\_\_\_\_

**This gift annuity application must be accompanied by proof of age: a photocopy of birth certificate, passport, or a driver's license.**



# Charitable Gift Annuity

**Southern Poverty Law Center**  
Fighting Hate • Teaching Tolerance • Seeking Justice  
400 Washington Avenue  
Montgomery, AL 36104  
T 334.956.8200 Toll Free 888.414.7752  
plannedgiving@splcenter.org

# Easy steps to begin your Charitable Gift Annuity

## FOR CASH GIFTS

Mail this application, proof of age, and your check to the address below.

For credit card transactions, please contact Planned Giving (toll free) at 888.414.7752.

## FOR STOCK GIFTS

If you have stock certificates in your possession, please contact Planned Giving (toll free) at 888.414.7752.

If your broker is transferring the stock:

1. Provide your broker with SPLC's account information:

Ben Easterling, Jr., Broker  
Stifel, Nicolaus & Co, Inc.  
7460 Halcyon Pointe Drive, Suite 100  
Montgomery, AL 36117  
Phone 888.231.0206  
Acct. #22024754  
DTC (Direct Deposit Number) #0793  
Federal Tax ID Number #63-0598743

2. Mail the attached application and proof of age to the address below.

### IMPORTANT:

Please notify Melanie Darrington at 334.956.8433 or [melanie.darrington@splcenter.org](mailto:melanie.darrington@splcenter.org), in advance of pending DTC deliveries. Please include your broker's name and telephone number.

See additional information required on back page.

Please mail the completed application form along with your gift to:

Southern Poverty Law Center, Inc.  
Attn: Pat Thornton  
400 Washington Avenue  
Montgomery, AL 36104

For questions or more information, contact Pat Thornton at 334.956.8367, toll free 888.414.7752, or by email at [pat.thornton@splcenter.org](mailto:pat.thornton@splcenter.org).

DETACH THIS CARD AND KEEP WITH YOUR RECORDS



## Gift Annuity Application

I am making a contribution in the amount of \$ \_\_\_\_\_ to establish a Charitable Gift Annuity.

Enclosed is:  Check  Money Order  Securities (See back page for further instructions)

**First Annuitant** \_\_\_\_\_ S.S. # \_\_\_\_\_

Address \_\_\_\_\_ Birthdate \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_ Telephone \_\_\_\_\_

**Second Annuitant** \_\_\_\_\_ S.S. # \_\_\_\_\_

Address \_\_\_\_\_ Birthdate \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_ Telephone \_\_\_\_\_

Relationship of First Annuitant to Second Annuitant \_\_\_\_\_

**DONOR(S)** If this annuity gift was NOT made by the above mentioned annuitant, please enter name and address of the DONOR(s) here (Use additional paper if needed):

Name \_\_\_\_\_ S.S. # \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

**IRS DISCOUNT RATE** Changes monthly and affects the tax deduction within a 3-month window of gift date.

**Please select one option:**

I prefer a higher initial income tax deduction.

I want payments that are more tax advantaged over a period of years.

### PAYMENTS

**The SPLC shall make payments (select one):**  Annually  Semi-annually  Quarterly  Monthly

For a single life annuity, payments will be made to the person named above as **First Annuitant**.

For a two-life annuity (select one):

The check should be made payable to both Annuitants jointly while both are living.

The check should be made payable to the First Annuitant for life then to Second Annuitant for life.

Payments are to start:  This Year  Defer to Year: \_\_\_\_\_

Please have payment electronically deposited to the financial institution indicated.

Bank Name \_\_\_\_\_ Bank Telephone \_\_\_\_\_

Bank Address \_\_\_\_\_

Your Account # \_\_\_\_\_  Savings  Checking

Bank Routing # \_\_\_\_\_

**Please enclose a deposit slip or a voided check.**

CONTINUED ON REVERSE SIDE