

# Charitable Gift Annuity One Life

IMMEDIATE

DEFERRED

This Charitable Gift Annuity Agreement ("Agreement") is made between \_\_\_\_\_ ("Donor") and SILICON VALLEY COMMUNITY FOUNDATION (the "community foundation").

Donor hereby irrevocably transfers to the community foundation the following property: \_\_\_\_\_ . The fair market value of the above property is \_\_\_\_\_ .

The community foundation hereby agrees to pay to \_\_\_\_\_ ("Annuitant"), during his/her lifetime, an annuity or annual sum of \$ \_\_\_\_\_ , commencing on \_\_\_\_\_ and continuing during the rest of his/her lifetime. The annual annuity amount shall be paid in equal

MONTHLY

QUARTERLY

ANNUAL INSTALLMENTS

of \$ \_\_\_\_\_ delivered by check or electronic transfer. The first installment, a pro-rated payment in the amount of \$ \_\_\_\_\_ , will be payable on \_\_\_\_\_ .

This annuity is \_\_\_\_\_ % of the fair market value of the property transferred by Donor, in accordance with the uniform rates established by the American Council on Gift Annuities.

The annuitant's address, birth date and age at his/her nearest birthday are included on Exhibit A, attached hereto and incorporated herein.

Annuities are subject to regulation by the State of California. Payments under this Agreement, however, are not protected or otherwise guaranteed by any government agency or the California Life and Health Insurance Guarantee Association.

The obligation of the community foundation to pay this annuity shall terminate with the payment preceding the death of Annuitant. If the Annuitant dies before the commencement of payments as provided above, the community foundation is released from all obligation to the Annuitant under this Agreement.

### Choose One

The gift is completely unrestricted. The community foundation shall use the gift made by Donor for its unrestricted purposes, including and not limited to support of the community foundation's mission to strengthen the common good, improve quality of life and address the most challenging problems in San Mateo and Santa Clara counties.

The gift is partially restricted (fund minimums apply). The community foundation may use a portion of the gift made by Donor for its unrestricted purposes, including and not limited to support of the community foundation's mission to strengthen the common good, improve quality of life and address the most challenging problems in San Mateo and Santa Clara counties. The specific restricted amount and the use restrictions for the restricted portion of the gift are described on Exhibit B, attached hereto and incorporated herein.

This annuity may not be assigned except to the community foundation.

This Agreement shall be governed by the laws of the State of California.

\_\_\_\_\_  
DONOR'S SIGNATURE

\_\_\_\_\_  
DATE

\_\_\_\_\_  
PRINT NAME

\_\_\_\_\_  
SILICON VALLEY FOUNDATION REPRESENTATIVE

\_\_\_\_\_  
DATE

\_\_\_\_\_  
PRINT NAME AND TITLE

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## EXHIBIT A

### PRIMARY CONTACT INFORMATION - DONOR

\_\_\_\_\_  
NAME

\_\_\_\_\_  
ADDRESS  HOME  BUSINESS

\_\_\_\_\_  
CITY STATE ZIP

\_\_\_\_\_  
EMAIL#1 EMAIL#2

\_\_\_\_\_  
HOME NUMBER MOBILE NUMBER

\_\_\_\_\_  
DATE OF BIRTH AGE AT NEAREST BIRTHDAY

\_\_\_\_\_  
SOCIAL SECURITY NUMBER

MALE  FEMALE

### ANNUITANT

\_\_\_\_\_  
NAME

\_\_\_\_\_  
ADDRESS  HOME  BUSINESS

\_\_\_\_\_  
CITY STATE ZIP

\_\_\_\_\_  
EMAIL#1 EMAIL#2

\_\_\_\_\_  
HOME NUMBER MOBILE NUMBER

\_\_\_\_\_  
DATE OF BIRTH AGE AT NEAREST BIRTHDAY

\_\_\_\_\_  
SOCIAL SECURITY NUMBER

MALE  FEMALE