

Charitable Gift Annuity Information Request

To learn what your tax and income benefits would be through a Charitable Gift Annuity for the benefit of your parish or diocesan ministry, please return this form to the Foundation for the Diocese of Helena.

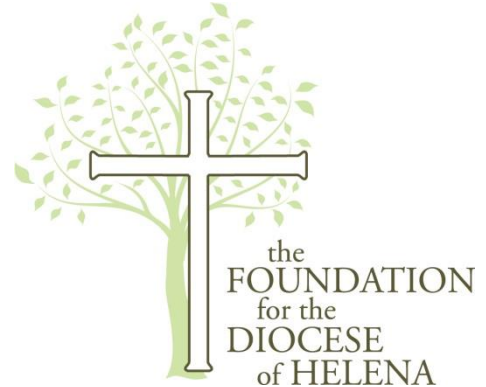
Name: _____

Address: _____

Date of Birth: _____

Phone: _____

Email: _____



Gift amount (*select as many as you would like proposals for*):

- \$2,500 (minimum)
- \$5,000
- \$10,000
- \$25,000
- \$50,000
- Other \$ _____

Your primary incentive (*select one*):

- Maximize tax savings
- Maximize income
- Not sure – send me comparison proposals that maximize tax savings and maximize income
- Somewhere in between maximizing tax savings and income

Who would receive the annuity payments (*select one*):

- Myself (one-life gift annuity)
- A joint annuity (two-life gift annuity), myself and:
 - o Name of second person: _____
 - o Date of birth of second person: _____
- Someone other than me would receive the annuity income (such as a parent, priest, spouse, etc.):
 - o Name of person to receive annuity payments: _____
 - o Date of birth of person to receive annuity payments: _____

Please direct questions and information requests to the Foundation for the Diocese of Helena, (406) 442-5820, fax (406) 442-5191, email jsaarinen@diocesehelena.org, or mail PO Box 1729, Helena, MT 59624.

Planned gifts such as these are an integral part of the long-term financial strategy of parishes and ministries within the Diocese of Helena, and the Foundation stands ready to help any way we can!