APPLICATION FOR
ANNUITY OR POOLED INCOME FUND GIFT
WITH THE WEST OHIO CONFERENCE
OF THE UNITED METHODIST CHURCH

32 Wesley Boulevard, Worthington, Ohio 43085-3585

The undersigned desires to make an ***Irrevocable Annuity or Pooled Income Fund Gift*** through the Council on Development of the West Ohio Conference of The United Methodist Church.

FORM OF GIFT: ☐ Check Amount: $_____

☐ other (please describe) _____

TYPE OF GIFT: ☐ Charitable Gift Annuity * One Life _____ Two Life _____ Annuity Rate _____%

☐ Deferred Charitable Gift Annuity *One Life _____ Two Life _____ Annuity Rate _____%

Date for first payment _____

FIRST BENEFICIARY:

Name _____
First MI Last

Address _____

City _____ State _____ Zip _____

Social Security Number _____ Sex _____

Date of Birth _____ Age nearest birthday _____

SECOND BENEFICIARY:

Name _____
First MI Last

Address _____

City _____ State _____ Zip _____

Social Security Number _____ Sex ____

Date of Birth _____ Age nearest birthday ____

(Please list additional beneficiaries, in the same format as above, on another sheet of paper.)

The donor intends that this ***irrevocable gift*** will promote the work of the West Ohio Conference of The United Methodist Church. At the end of the life or lives of the income beneficiary(ies), the remainder of this gift shall be used for the advancement of the church as determined by the Annual Conference, except to the extent that the donor shall, at this time, ***designate*** the following purpose within the church for which the gift shall ultimately be used:

The Council on Development was established in 1976. Responsibility for governing the Council on Development is vested in persons who are named by various entities of the West Ohio Conference of The United Methodist Church. The Bishop of the West Ohio Area serves as chairperson of the Council on Development.

DISCLOSURE

Common investment funds managed by our organization 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). Information in this application is provided to you in accordance with the requirements of that Act.

* Quarterly payments to a beneficiary from a Charitable Gift Annuity are a general obligation of the West Ohio Conference of The United Methodist Church, and as such are backed by the Conference and affiliate's assets. At December 31, 2009, our Gift Annuity Fund and undesignated funds of the Board of Trustees exceeded $ 30,000,000 in market value. The majority of these assets are invested in U.S. government obligations, equities, mortgage backed securities, and cash equivalents.

_____ _____
Date Donor's Signature

_____
Donor's Signature

_____ By: _____
Date Council on Development