

I. DONOR INFORMATION *Individuals complete Section A; Organizations complete Section B*
Submit Addendum for additions to other funds
Section A
Donor #1 Name _____ Date of Birth _____ SSN _____
Title First Middle Last
 Male Female Single Married Divorced Widowed

Donor #2 Name _____ Date of Birth _____ SSN _____
Title First Middle Last
 Male Female Single Married Divorced Widowed

Address _____ City _____ State ____ Zip _____

Home Phone _____ Work Phone _____ E-Mail Address _____

Home Church (optional) _____ Address _____

Section B
Organization Name _____ Trade/Common Name _____

Contact Name _____ Tax Identification Number _____

Address _____ City _____ State ____ Zip _____

Daytime Phone _____ Fax _____ -Mail Address _____

II. FUND INFORMATION *(Please complete all fields regarding the Permanent Fund you wish to benefit with your gift)*

Fund Name _____ Fund Identification Number _____

Addition Amount \$ _____ OR Addition Percentage _____

(Use if you are splitting your gift between multiple permanent funds, and wish to split your gift in percentage proportions.)

 Do you give the Foundation permission to publish your name, i.e. publications, websites honoring donors, notification to interested parties to give recognition? Yes No

 The charitable beneficiary will be notified of your addition to the Permanent Fund. May the Foundation include your name with this notification? Yes No

If this information is not completed by the Donor(s), the Foundation will release and/or publish your name.

III. GIFT INFORMATION
Cash Gift *(Please make checks payable to Presbyterian Foundation)*

Owner Name(s) _____ Gift Amount \$ _____

Ownership of Cash Gift

- | | | |
|--|---|--|
| <input type="checkbox"/> Solely owned | <input type="checkbox"/> Community property | <input type="checkbox"/> Joint tenant with right of survivorship |
| <input type="checkbox"/> Tenants in common <i>(List percentage of Cash Gift owned by each Owner)</i> | | <input type="checkbox"/> Trust <i>(Complete Trust Revocation Notification)</i> |
| Owner _____ | Percentage of ownership _____% | |
| Owner _____ | Percentage of ownership _____% | |

Credit Card Payment Name as it appears on your credit card _____

 Credit Card type Master Card Visa Credit Card Number _____ Expiration Date _____

A bank fee will be charged for the utilization of a credit card payment. This fee will be charged against the account benefiting from your addition and will not affect the value of your Gift for deduction purposes.

Securities - Complete the Securities Notification Addendum

The value of the securities on the Gift Date, along with any other assets identified in this document, shall determine the value of the Gift. The value of the Gift shall be determined net of back-end sales charges or redemption fees. If the Donor(s) is delivering shares of certificated securities in excess of the shares necessary to complete the gift, the number of shares to be gifted must be specified on the Securities Notification Addendum, along with the number of shares that the Donor(s) is requesting to be returned.

Notify the Operations Department of the Foundation of all security transfers prior to transfer by faxing the attached Securities Notification Addendum to 502-569-5980, e-mailing the information to securitiesmailbox@fdn.pcusa.org, or contacting the Foundation Client Services department at 800-858-6127. The original completed Securities Notification Addendum must be mailed with this form.

Other Property (For information about Foundation requirements for transferring Other Property please call Client Services at 800-858-6127.)

Gift Description _____

Owner Name(s) _____

Ownership of Gift

- Solely owned
 - Community property
 - Joint tenant with right of survivorship
 - Tenants in common *(List percentage of Other Property owned by each Owner)*
 - Trust *(Complete Trust Revocation Notification)*
- Owner _____ Percentage of ownership _____%
- Owner _____ Percentage of ownership _____%

IV. STATEMENT OF UNDERSTANDING

Individual Donors

It is my desire to make this **irrevocable** gift to the Presbyterian Foundation to add to the Permanent Fund(s) identified on this document and addenda:

Donor #1 Signature _____ Date _____

Donor #2 Signature _____ Date _____

Note: If a Power of Attorney is signing this form on behalf of a Donor, the Power of Attorney authorization must be included with this form and must authorize the Power of Attorney to make charitable gifts on behalf of the donor.



Organization Donors - signatures of two officers are required

It is the organization's desire to make this **irrevocable** gift to the Presbyterian Foundation to add to the Permanent Fund(s) identified on this document and addenda:

Officer #1 Signature _____ Title _____ Date _____

Officer #2 Signature _____ Title _____ Date _____

V. MAILING INFORMATION

For cash gifts,
via U.S. postal system to:
Presbyterian Foundation
P.O. Box 406863
Atlanta, GA 30384-6863

Or by overnight mailing to:
Bank of America
Lockbox Services (lockbox #406863)
6000 Feldwood Road
College Park, GA 30349

For gifts of securities and other property,
send information to:
Presbyterian Foundation
200 East Twelfth Street
Jeffersonville, IN 47130

Commitment to Customer Privacy

The Presbyterian Church (U.S.A.) Foundation (the “Foundation”) is committed to handling donor information responsibly. It recognizes and respects the privacy of those who make and receive charitable gifts through the Foundation and believe the confidentiality and security of personal financial information is one of its fundamental responsibilities. This privacy policy will continue to cover information collected about a donor(s) at the time a gift is established and at any time during the management of a gift to the Foundation.

Who are our “Customers” for purposes of this Privacy Policy?

Customers are individuals, not companies or trusts, who obtain financial products or services from the Foundation.

This privacy policy applies only to donors who have a direct customer relationship with the Foundation. If a gift is given to the Foundation with the assistance of another charitable organization, its privacy policy may also apply.

Collection of Customer Information

The Foundation collects, retains, and uses customer information only where it reasonably believes such information would be useful to the customer and allowed by law. Customer information is collected by or on behalf of the Foundation from:

- Account applications and other forms submitted by a donor(s) or a beneficiary(ies);
- Correspondence, written or electronic, or telephone contacts with customers inquiring about gifts or gift accounts;
- Transaction history of gifts or gift accounts with the Foundation; or
- Other publicly available sources which are helpful in connection with making available Foundation services.

Disclosure of Customer Information

The Foundation provides an opportunity for donor(s) establishing a permanent fund account or a gift annuity to elect anonymity on the Application and Agreement.

The Foundation discloses customer information to affiliates, such as the Presbyterian Church (U.S.A.), Presbyterian Church (U.S.A.) Corporation, New Covenant Trust Company, N.A. and New Covenant Funds, and third parties who are not affiliated with the Foundation. Instances in which information is disclosed to affiliates and third parties includes:

- As necessary to complete a customer-initiated transaction (for example to beneficiaries of charitable gifts as necessary to carry out the donor’s instructions, except where the donor instructs the Foundation that he/she wishes to remain anonymous);
- The Foundation will share information as requested by the donor. For example, when a gift is made as a memorial contribution, a donor may request that the Foundation advise the family of the deceased.
- In dealing with service providers engaged by the Foundation so long as the service provider agrees to safeguard confidential customer communication.

Security of Customer Information

The Foundation maintains:

- Policies and procedures designed to assure only appropriate access to, and use of information about customers of the Foundation; and
- Physical, electronic and procedural safeguards to guard non-public personal information of customers of the Foundation.