



PLANNED GIFT ILLUSTRATION REQUEST

Please send me calculations for the following type(s) of planned gift(s). I/we understand that this request is for educational purposes only, and does not indicate a commitment by me/us to make a gift. I/we further understand that any information provided will be kept strictly confidential by Connecticut Community Foundation.

Name(s)

Address

Phone

Fax

E-mail

GIFT INFORMATION

Assets to be given: Cash Publicly-Traded Securities Real estate
 Other _____

Describe

\$ _____
Approximate amount of gift being considered

\$ _____
Approximate cost basis, if stock or other securities (optional)

Type of Gift:

- | | |
|---|---|
| <input type="checkbox"/> Charitable Gift Annuity | <input type="checkbox"/> Charitable Remainder Annuity Trust |
| <input type="checkbox"/> Deferred Gift Annuity – begin income in ____ years | <input type="checkbox"/> Charitable Remainder Unitrust |
| <input type="checkbox"/> Gift of remainder interest | <input type="checkbox"/> Charitable Lead Trust |

One life Two lives Term of years _____ (trusts only) Other (trusts only) _____

BENEFICIARY INFORMATION

Name of first donor/annuitant/beneficiary

Birth date of first donor or annuitant

Name of second donor/annuitant/beneficiary

Birth date of second donor or annuitant