

Charitable Gift Annuity Application

SECTION 1—DONOR INFORMATION

DONOR 1

Same as Annuitant 1

Name (first, middle initial, last):

Legal Domicile (state): _____

Primary Mailing Address:

Email: _____

Phone: _____

Birthdate: _____

DONOR 2

Same as Annuitant 2

Name (first, middle initial, last):

Legal Domicile (state): _____ Same as Donor 1

Primary Mailing Address: Same as Donor 1

Email: _____

Phone: _____

Birthdate: _____

SECTION 2—GIFT INFORMATION (Minimum gift amount is \$10,000)

I enclose my check for \$_____ payable to Bowdoin College.

I would like to make my gift with a credit card. Please contact me.

I will have the following appreciated securities (held for more than one year) transferred:

Bowdoin College will provide transfer instructions for gift annuities funded with appreciated securities.

Your gift annuity will be valued as of the date the securities arrive in Bowdoin's brokerage account.

Charitable Gift Annuity Program Disclosure Statement (continued)

INVESTMENT INFORMATION

It is Bowdoin's present intention to maintain the assets used to fund annuities in a pooled investment fund held separately from other College funds. Investment management and administrative services are presently provided by TIAA Kaspick of Redwood Shores, California, and Boston, Massachusetts. At some point in the future, the College may decide to commingle the annuity assets with its endowment funds.

It is expected that the pool will invest in a diversified portfolio of assets which may include both debt and equity securities in such proportions as seem advisable from time to time in light of current market and economic conditions, as well as other .8 (s w)9.6mS-17.7 (i)-16.3 (f)14.8 (o)9.D 7 >(n)11.8 (t a)-20.6 (x)-29..7 (v)0.9 (en (f)14.