

**ADDITIONAL INFORMATION FOR A  
NEW CHARITABLE TRUST OR GIFT ANNUITY**

TRUST/GIFT ANNUITY NAME:	
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The following information should be submitted for a new charitable trust or gift annuity:

- Trust Legal Agreement or Gift Annuity Contract
- Gift Calculations (PG Cales or Crescendo)

HighGround will administer the account based on the legal agreement/contract and gift calculations provided unless otherwise notified. **Complete the information below ONLY if the information is NOT included in the gift documentation provided.**

**1. DONOR INFORMATION**

**DONOR 1:**

NAME	ADDRESS 1
PHONE	ADDRESS 2
SSN	BIRTHDATE

**DONOR 2:**

NAME	ADDRESS 1
PHONE	ADDRESS 2
SSN	BIRTHDATE

**2. BENEFICIARY/ANNUITANT INFORMATION** *(if different from donor)*

**BENEFICIARY/ANNUITANT 1:**

NAME	ADDRESS 1
PHONE	ADDRESS 2
SSN	BIRTHDATE

**BENEFICIARY/ANNUITANT 2:**

NAME	ADDRESS 1
PHONE	ADDRESS 2
SSN	BIRTHDATE

**3. FUNDING IF OTHER THAN CASH**

DESCRIPTION	TAX BASIS
GIFT VALUE	FOR TRUST, DATE ACQUIRED BY DONOR

**4. PAYMENT METHOD** If the gift is for a repeat donor/beneficiary, HighGround will use the payment method on file unless otherwise noted:

HighGround prefers to make an electronic transfer via ACH; please attach a voided check. If payments are to be made to a brokerage account, include the name and address of the broker along with proper instructions.

**BENEFICIARY/ANNUITANT 1:**

METHOD OF PAYMENT	IF ACH, TYPE OF ACCOUNT
ABA	ACCOUNT NUMBER
OTHER INSTRUCTIONS	

**BENEFICIARY/ANNUITANT 2:**

METHOD OF PAYMENT	IF ACH, TYPE OF ACCOUNT
ABA	ACCOUNT NUMBER
OTHER INSTRUCTIONS	

**5. TRUST INFORMATION**

DISCOUNT RATE	TRUST EIN

**6. STATEMENTS TO DONOR(S)/BENEFICIARY(S)**

TRUST—an account statement will be provided to the donor(s) and income beneficiary(s) on a quarterly basis unless otherwise indicated below

GIFT ANNUITY—an account statement will not be provided to the donor and/or annuitant unless otherwise indicated below

**SPECIAL INSTRUCTIONS**

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**7. REPORTING TO CHARITABLE BENEFICIARY**

NAC (FASB) Code:

I\_CG Code:

Group Code:

Client Account #1:

Client Account #2:

User Designation:

**8. SPECIAL INSTRUCTIONS** Please comment upon any other special needs HighGround should be aware of in the administration of this account.