



### Gift Form 3.2

**This form is used when a specialty gift is made such as Stocks, Bonds, Real Estate, Life Insurance, etc. This is not for a cash donation.**

#### Gift Information

Date: \_\_\_\_\_

Fund Name: \_\_\_\_\_

Fund Representative: \_\_\_\_\_

Gift Amount: \$ \_\_\_\_\_

Multiple Gifts:  Yes  No

**Gift Type:**  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Cost Basis at time of delivery:** High \_\_\_\_\_ Low \_\_\_\_\_ Average \_\_\_\_\_

**Appraisal at time of delivery:** \$ \_\_\_\_\_ **Copy of Appraisal Attached?** YES

**Special notes or needs for the gift:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**If life insurance, was beneficiary information verified to be CFF? Write name, date and time of representative who confirmed, ask for confirmation to be send via mail or email:**  
\_\_\_\_\_

**If life insurance, when does premium need to be paid?** \_\_\_\_\_

**Is policy in safe? If not, call and ask for replacement policy** \_\_\_\_\_

Did donor receive a benefit?  Yes  No

If yes, what benefit was received?  
\_\_\_\_\_  
\_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_