

GIFT NOTICE

THE CHURCH OF
JESUS CHRIST
OF LATTER-DAY SAINTS

LDS Philanthropies
Attn: Planned Giving Office
1450 N University Avenue (801) 422-4444
Provo, UT 84604 (800) 525-8074

This form should be completed for all gifts received by or proposed to your organization. Complete appropriate areas, obtain authorized signature(s), and send to LDS Philanthropies. LDS Philanthropies serves all Church departments and educational institutions.

Your Name Jim Welsh	Your Position Donor Liaison	Your Phone 801-422-4447
LDSP Representative Jim Welsh	Gift Planning Representative Jerry Reynolds	Date Prepared 5/25/2016

Donor Information

<input type="checkbox"/> Individual <input type="checkbox"/> Corporation <input type="checkbox"/> Foundation <input type="checkbox"/> Estate <input type="checkbox"/> Other (List)		Name of employer, if works for matching gift organization			
Legal name of donor/Organization name	i5 ID	Gender: <input type="checkbox"/> M <input type="checkbox"/> F LDS: <input type="checkbox"/> Y <input type="checkbox"/> N	Age	Birth date	
Other donor: <input type="checkbox"/> Spouse <input type="checkbox"/> Joint donor <input type="checkbox"/> Organization contact	i5 ID	Gender: <input type="checkbox"/> M <input type="checkbox"/> F LDS: <input type="checkbox"/> Y <input type="checkbox"/> N	Age	Birth date	
Street address	City	County/Country	State	Zip code (Zip + 4) -	
Home phone (with area code)	Business phone (with area code)	E-mail address			

Acknowledgment Information

Thank you letter salutation: <input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms. <input type="checkbox"/> Dr. <input type="checkbox"/> Mr. & Mrs. <input type="checkbox"/> Brother/Sister <input type="checkbox"/> Other (specify):	Publicity: <input type="checkbox"/> Yes <input type="checkbox"/> No Confidential: <input type="checkbox"/> Yes <input type="checkbox"/> No
Other acknowledgment details	

Gift Instructions

Gift is: <input type="checkbox"/> Proposed <input type="checkbox"/> Complete	Gift is: <input type="checkbox"/> Cash <input type="checkbox"/> Securities <input type="checkbox"/> Real estate <input type="checkbox"/> Other	Appeal code:
Gift is: <input type="checkbox"/> Restricted <input type="checkbox"/> Unrestricted	Pledge: <input type="checkbox"/> One time <input type="checkbox"/> Installments (frequency:) <input type="checkbox"/> By date:	
Other gift/pledge details, or special instructions		

Recipient (BYU/BYUL/BYUH LDSBC/Church/Other)	% of Gift	Restriction	Account Number (check box if new)	Fair Market Value	Present Value
	%		<input type="checkbox"/>	\$	\$
	%		<input type="checkbox"/>	\$	\$
	%		<input type="checkbox"/>	\$	\$
	%		<input type="checkbox"/>	\$	\$
(Attach correspondence, valuation, and delivery documents)			TOTAL	\$	\$

In-kind Gift Information

Name and title of individual stating estimated value	Estimated value based on
Gift delivery date	<input type="checkbox"/> In-kind gift is for related use by institution

Acceptability

I have reviewed this gift for acceptability, compatibility, usefulness, and propriety. I agree with the value indicated.

Print name and title (must be VP, Dean, Director, or other administrator)	Signature	Date
Print name and title (must be VP, Dean, Director, or other administrator)	Signature	Date
Print name and title (must be VP, Dean, Director, or other administrator)	Signature	Date

Donor Name:

Additional Gift Information

Is the proposed gift a primary source of income? <input type="checkbox"/> Yes <input type="checkbox"/> No		Estate value \$	CAE reporting information <input type="checkbox"/> Outright <input type="checkbox"/> Planned <input type="checkbox"/> Bequest		Estimated closing date Pronto
Type of gift <input type="checkbox"/> Outright <input type="checkbox"/> CGA <input type="checkbox"/> PIF <input type="checkbox"/> Remainder interest deed <input type="checkbox"/> CRUT – Net income <input type="checkbox"/> DAF <input type="checkbox"/> Bargain sale <input type="checkbox"/> Support organization <input type="checkbox"/> CRUT – Flip <input type="checkbox"/> DCGA (years) <input type="checkbox"/> Insurance <input type="checkbox"/> Will <input type="checkbox"/> CRUT – Standard <input type="checkbox"/> Lead trust <input type="checkbox"/> Revocable trust <input type="checkbox"/> Other (specify): <input type="checkbox"/> CRAT				Duration (check one box only) <input type="checkbox"/> 1 life <input type="checkbox"/> lives <input type="checkbox"/> Term (years) <input type="checkbox"/> Longer of life/ lives, or years <input type="checkbox"/> Shorter of life/ lives, or years <input type="checkbox"/> Life Plus years	
Payout rate %	Payments per year	CRI Percent %	Funding date	Expected maturity year	Donor is U.S. Citizen <input type="checkbox"/> Yes <input type="checkbox"/> No
Income beneficiary (if other than donor)		SSN/Tax ID	Age	Birth date	Gender <input type="checkbox"/> M <input type="checkbox"/> F
Income beneficiary (if other than donor)		SSN/Tax ID	Age	Birth date	Gender <input type="checkbox"/> M <input type="checkbox"/> F
Initial trustee(s)		Initial trustee address			
Successor trustee		Successor trustee address			
Name of proposed trust		Other gift information			

Donor Advisors

Name of donor's attorney	Address	
Phone (with area code)	Fax (with area code)	E-mail
Name of donor's accountant or professional advisor	Address	
Phone (with area code)	Fax (with area code)	E-mail

Transmitted to Finance (with this form)

<input type="checkbox"/> All correspondence	<input type="checkbox"/> DTC minutes	<input type="checkbox"/> Letter of understanding	<input type="checkbox"/> Reimbursement request
<input type="checkbox"/> Appraisal dated:	<input type="checkbox"/> Final legal documents	<input type="checkbox"/> Photographs	<input type="checkbox"/> Scholarship letter
<input type="checkbox"/> Art work provenance	<input type="checkbox"/> Final tax calculation	<input type="checkbox"/> Real estate transmittal packet	<input type="checkbox"/> Title report
<input type="checkbox"/> Check #:	<input type="checkbox"/> Form 8283	<input type="checkbox"/> Real prop deed/title certificate	<input type="checkbox"/> Valuation support documents
<input type="checkbox"/> Deed of gift/temporary receipt	<input type="checkbox"/> GRC minutes	<input type="checkbox"/> Recipient acceptance	<input type="checkbox"/> Other (specify):

Gift Value

Provided by donor \$		Source	
Fair Market Value	Present Value	Approvals	
\$	\$	Date	Gift Planning signature
\$	\$	Date	Purchasing signature
\$	\$	Date	LDSP Controller/Finance signature

Distribution (check box under C if complete file or N if gift notice only. Date and initial when action completed.)

Finance/Records/Office Services		Gift Planning/Donor Liaison					
C	N	Date/Initials		C	N	Date/Initials	
<input type="checkbox"/>	<input type="checkbox"/>	BYU Financial Services		<input type="checkbox"/>	<input type="checkbox"/>	BYU Investment Properties	
<input type="checkbox"/>	<input type="checkbox"/>	BYU-H Development		<input type="checkbox"/>	<input type="checkbox"/>	BYU Legal Counsel	
<input type="checkbox"/>	<input type="checkbox"/>	BYU-I Development		<input type="checkbox"/>	<input type="checkbox"/>	Church Investment Properties	
<input type="checkbox"/>	<input type="checkbox"/>	LDSP Acknowledgment		<input type="checkbox"/>	<input type="checkbox"/>	Church Investment Securities	
<input type="checkbox"/>	<input type="checkbox"/>	LDS Business College		<input type="checkbox"/>	<input type="checkbox"/>	Church Legal Counsel	
<input type="checkbox"/>	<input type="checkbox"/>	Legal docs to recipient charity		<input type="checkbox"/>	<input type="checkbox"/>	Church Real Estate	
<input type="checkbox"/>	<input type="checkbox"/>	Other:		<input type="checkbox"/>	<input type="checkbox"/>	Church Treasury Services	
<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	Deseret Trust Company	
<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	LDSP Communication	
<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	Other:	