



## Planned Giving "Cheat Sheet"

### Fund and Gift Types



Fund Types	Main Contact	How it can be funded	Payout Restrictions	Management Fees	Why this makes sense for a donor	Forms to complete/sign	Role of Parish, School, or Agency
<b>CCF Endowments</b> 	Amy Higgins Donor Relations Coordinator (317) 236-1482 ahiggins @ archindy.org	<p><b>Create new:</b> \$5,000 minimum  <b>Add to existing:</b> any \$</p> <p><b>Now:</b> Cash, securities, IRA gifts (aka QCDs, 'RMD gifts'), proceeds from personal property or real estate</p> <p><b>Deferred:</b> Bequests, retirement plan assets (beneficiary), life insurance policy (beneficiary), CGA (beneficiary)</p>	<ul style="list-style-type: none"> <li>• <b>5 % Annual Distribution</b> of fund's value* (<i>current CCF Spending Policy</i>) <u>or</u> can choose to forgo distribution and reinvest it back into fund's principal. This can allow for faster growth.</li> <li>• <b>3-year Rolling Average*</b> of fund's value used to calculate distribution</li> <li>• <b>Purpose:</b> Distribution must benefit P/S/A or ministries within them</li> </ul>	<p><b>Endowment fund annual administration fee scale:</b></p> <p>1% if valued &lt; \$1M                      0.7% if valued \$1M-\$2M                      0.5% if valued \$2M-\$5M                      0.4% if valued &gt; \$5M</p> <p>* <i>rates include 0.35 basis point fee for money managers</i></p>	<ul style="list-style-type: none"> <li>• Gives and grows perpetually, providing annual gifts to P/S/A</li> <li>• Increases P/S/A's long-term financial stability</li> <li>• Way to honor / memorialize loved one</li> <li>• Utilizes the power of compound interest/the market</li> <li>• CCF abides by USCCB's Ethical Investing Guidelines, in line with Catholic teaching</li> <li>• Charitable tax deduction for full-market value of gift (avoids capital gains tax w/ appreciated asset)</li> </ul>	<p><b>All endowments:</b></p> <ul style="list-style-type: none"> <li>• CCF New Fund application</li> <li>• Endow. Fund Gift Agreement (contract)</li> </ul> <p><b>If scholarship endowment, add:</b></p> <ul style="list-style-type: none"> <li>• Scholarship Grants Process &amp; Procedures Acknowledgment Form</li> </ul> <p><b>If endowment is donor-initiated and funded and donor desires to waive representation rights to P/S/A (i.e. P/S/A signs final contract, maintains fund rep. privileges) add:</b></p> <ul style="list-style-type: none"> <li>• Fund Rep. Reassignment Form</li> </ul>	<ul style="list-style-type: none"> <li>• Monitor Fundriver account for funds</li> <li>• Ensure fund is being used as the purpose of the endowment indicates</li> <li>• Ensure Scholarship Grants Process &amp; Procedures guidelines are being maintained (if scholarship)</li> <li>• Promote awareness and encourage supporter to contribute via online giving options, literature, events, social media, bulletin promo, etc.</li> <li>• Can utilize CCF's endowment giving portal <a href="https://secure.acceptiva.com/?cst=EDEKrd">secure.acceptiva.com/?cst=EDEKrd</a></li> </ul>
<b>CCF DAFs</b> (Donor Advised Funds)	Amy Higgins Donor Relations Coordinator (317) 236-1482 ahiggins @ archindy.org	<p>* <i>Per Arch policy, DAFs only available for individual donors, not P/S/As or orgs.</i></p> <p><b>Create new*:</b> \$5,000 minimum  <b>Add to existing:</b> any \$</p> <p><b>Now:</b> Cash, securities, proceeds from personal property or real estate</p> <p><b>Deferred:</b> Bequests, retirement plan assets (beneficiary), life insurance policy (beneficiary)</p> <p>* <i>Per IRS regs, DAFs can't be funded by/receive \$ from QCDs ('RMD gifts')</i></p>	<ul style="list-style-type: none"> <li>• <b>Distribution %:</b> DAFs have neither a required annual distribution % nor a distribution % limitation. While CCF 'owns' the DAF, donor advises when &amp; how much to grant.</li> <li>• <b>Purpose - at least 51%</b> of distributions must go to an P/S/A or ministry within. <u>Up to 49%</u> can go to non-Arch Catholic orgs if listed in the Official Catholic Directory (Kennedy Directory)</li> <li>• <b>Pledges - per IRS regs, can't be used for legally enforceable pledges (can be used, however, for 'good-faith'/non-legally enforceable pledges, which are most pledges assoc. with P/S/A appeals or campaigns)</b></li> </ul>	<p><b>DAF annual administration fee scale:</b></p> <p>1% if valued &lt; \$1M                      0.7% if valued \$1M-\$2M                      0.5% if valued \$2M-\$5M                      0.4% if valued &gt; \$5M</p> <p>* <i>rates include 0.35 basis point fee for money managers</i></p>	<ul style="list-style-type: none"> <li>• Easy to establish, flexible, hands-on for donor</li> <li>• Acts like a 'charitable investment account'</li> <li>• Charitable tax deduction for full-market value of gift (avoids capital gains tax w/ appreciated assets) per gift added. Anyone can add to it.</li> <li>• Compatible with '<b>charitable bunching</b>' strategy, more popular now with the raised standard deduction</li> <li>• Funds continue to grow in CCF Investment pool</li> <li>• Easier than private foundation, no startup fee</li> <li>• Advised distributions (grants) not limited to 5%</li> <li>• Utilizes power of compound interest/the market</li> <li>• CCF abides by USCCB's Ethical Investing Guidelines, in line with Catholic teaching</li> </ul>	<p><b>To set up:</b></p> <ul style="list-style-type: none"> <li>• CCF DAF application</li> <li>• DAF Gift Agreement (final contract)</li> </ul> <p><b>To advise grants be made:</b></p> <ul style="list-style-type: none"> <li>• Grant Distribution Request Form (also available via CCF online portal)</li> </ul> <p>archindy.org/cf then 'Donor Advised Funds' button, top right</p>	<ul style="list-style-type: none"> <li>• Potential option to mention to high-capacity supporters, especially large stock givers, business owners, or donors interested in creating a 'family charitable fund' for inter-generational Catholic giving</li> <li>• Can utilize CCF's Legacy Giving page as resource for interested donors.</li> </ul> <p><a href="https://CCFFindy.giftlegacy.com">CCFFindy.giftlegacy.com</a></p>
<b>CCF CGAs</b> (Charitable Gift Annuities)	Jim Maslar Catholic Phil. Advisor (317) 236-1588 jmaslar @archindy.org	<p><b>Create new:</b> \$10,000 minimum  <b>Add to existing:</b> can't add to CGA once established (<i>alternative = est. another CGA</i>)</p> <p><b>Now:</b> Cash, securities, proceeds from personal property/real estate</p> <p><b>Deferred:</b> Bequests, retirement plan asset, life insurance policy, IRA QCD** ('RMD gift')</p> <p>* <i>Per IRS regs, CGAs can't be funded by a DAF</i>                      ** <i>Per Secure Act 2.0, a one-time-in-life QCD of up to \$50,000 can be used to create a CGA</i></p>	<ul style="list-style-type: none"> <li>• <b>Fixed Rates</b> - payment rate is based on age of annuitant(s) at time of gift, following American Council on Gift Annuities (ACGA) rates. Annuitant can choose monthly, quarterly, or annual installments.</li> <li>• <b>Age</b> - annuitant must be at least 60 (unless deferred period*). For two-life ('joint') CGA, younger must be at least 60</li> <li>* <i>For deferred CGAs, must be 60 when payments begin</i></li> </ul>	<p><b>Annual admin fee of 1%</b>, applied quarterly to balance of all CGAs.</p>	<ul style="list-style-type: none"> <li>• Fixed payments for life (can also be deferred for higher later rate, often to supplement retirement)</li> <li>• Partly tax-free income for donor and/or loved one</li> <li>• Charitable tax deduction in year of gift</li> <li>• For appreciated assets, <b>portion (not all)</b> of capital gains tax avoided</li> <li>• 'Win-win': donor gets income payments for rest of life and the ministry designated as beneficiary (<i>i.e. your P/S/A</i>) receives 100% of remaining at death.</li> <li>• Can provide better returns than low-performing assets, such as CDs or money market accounts</li> <li>• CCF abides by USCCB's Ethical Investing Guidelines, in line with Catholic teaching</li> </ul>	<p><b>To set up:</b></p> <ul style="list-style-type: none"> <li>• CGA Application</li> <li>• Gift Annuity Agreement (final contract)</li> <li>• Direct Deposit form</li> </ul> <p><b>After establishing:</b></p> <ul style="list-style-type: none"> <li>• CCF sends 1099s to annuitant each year</li> </ul>	<ul style="list-style-type: none"> <li>• Potential option to mention to 60+ year old donors intrigued by idea of getting income from charitable gift</li> <li>• Can utilize CCF's Legacy Giving page as resource for interested donors.</li> </ul> <p><a href="https://CCFFindy.giftlegacy.com">CCFFindy.giftlegacy.com</a></p>

Gift Types	Main Contact	Gift Source(s)	Payout Restrictions	Management Fees	Why this makes sense for a donor	Forms to complete	Role of Parish, School, or Agency
<p><b>Stocks</b></p> 	<p><b>Jeri Friel</b> Donor Relations Coordinator (317) 236-1415 jfriel@archindy.org</p>	<ul style="list-style-type: none"> <li>Selected shares of stocks, bonds, or mutual funds at the discretion of the donor</li> <li>Donor initiates transfer of shares from their brokerage to Archindy's Morgan Stanley account*, designating your P/S/A to receive the proceeds</li> <li><b>*P/S/As receive 100% of proceeds. This is a free service offered by Arch for all P/S/As</b></li> </ul>	<ul style="list-style-type: none"> <li><b>Purpose</b> - to benefit a P/S/A or ministries within them. <i>Gifts can be split between ministries</i> (ex. 75% parish, 25% UCA)</li> <li><b>Immediate Liquidation</b> - of shares after transfer to Archindy (next business day)</li> </ul>	<p>The brokerage/broker the Arch uses (Morgan Stanley) charges us an <b>extremely low</b> transaction fee for processing stock gifts (next to nothing). OSD passes on these savings to P/S/As, maximizing gift amount.</p>	<ul style="list-style-type: none"> <li>Avoid capital gains tax</li> <li>Makes large charitable gift possible</li> <li>Tax deduct fair market value at time of transfer (full appreciated amount)</li> <li>Tax-savvy way for funding a variety of planned giving vehicles (CGAs, DAFs, Endowments)</li> <li>Gifting securities can potentially be helpful for rebalancing a donor's securities portfolio (rebalancing the allocation %s within their portfolio) to maximize performance and lower risk while tapping tax benefits</li> </ul>	<ul style="list-style-type: none"> <li>Letter of Authorization - Donor can utilize Archindy's "Instructions for Donating Stock" Letter of Authorization or fill out online portal (both available at): <a href="http://www.archindy.org/DonateStock">www.archindy.org/DonateStock</a></li> <li>Tax Letter: <ul style="list-style-type: none"> <li>OSD handles tax letters for all stock gifts. For donor's tax deduction purposes, gift value is based on the avg of the high/low of that security on the day of transfer</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Promote awareness and encourage supporters to consider via online giving options, literature, social media, bulletin ad, etc.</li> <li>Consider including link/button on your online giving page to connect to Archindy Stock Gifting Page, with explicit instruction to designate your parish as beneficiary (<a href="http://www.archindy.org/DonateStock">www.archindy.org/DonateStock</a>)</li> </ul>
<p><b>IRA Gift</b></p>  <p>aka Qualified Charitable Distributions</p>	<p><b>Jeri Friel</b> Donor Relations Coordinator (317) 236-1415 jfriel@archindy.org</p>	<p>QCD = "Qualified Charitable Distribution"</p> <ul style="list-style-type: none"> <li>- Traditional IRAs</li> <li>- SEP IRAs (inactive)</li> <li>- SIMPLE IRAs (inactive)</li> <li>- Inherited IRAs</li> </ul> <p>Note: 401k/403b monies can be transferred to Traditional IRAs, then QCD'd</p>	<ul style="list-style-type: none"> <li>Donor must be 70.5+ years old</li> <li>Up to \$100,000 per spouse/year</li> <li>Credit towards RMD begins at 73+ years old*</li> <li><i>*Per Secure Act 2.0. QCDs can still be made at 70.5, even though the RMD age has been raised to 73</i></li> </ul>	<ul style="list-style-type: none"> <li>Donor's IRA custodian (Fidelity, Vanguard, etc.)= typically free</li> <li>if donor utilizes Archindy IRA QCD processing/portal to assist with processing, <b>there is no fee from Archindy.</b></li> <li><b>*P/S/A receives 100% of gift</b></li> </ul>	<ul style="list-style-type: none"> <li>Non-itemized tax benefit</li> <li>Lowers gross income (not included in donor's taxable income and thus potential tax benefits; Medicare, Social Security taxes)</li> <li>Full amount goes to charity tax-free (&amp; right away)</li> <li>Can fulfill up to \$100k of IRA Required Minimum Distribution for those 73 or older</li> <li>Can gift into endowment (but <b>not</b> a CGA or DAF)</li> </ul>	<ul style="list-style-type: none"> <li>Letter of Authorization - Donor can utilize Archindy's "Instructions for Donating from your IRA" Letter of Authorization or fill out online portal (both available at): <a href="http://www.archindy.org/DonateIRA">www.archindy.org/DonateIRA</a></li> <li>Tax acknowledgment letter requires special wording to comply with IRS regs. Please see next block.*</li> </ul>	<ul style="list-style-type: none"> <li>Same as above, but connecting to Archindy's IRA Donation Page: (<a href="http://www.archindy.org/DonateIRA">www.archindy.org/DonateIRA</a>)</li> <li>Some donors will inevitably have IRA custodian send QCD gift checks to your P/S/A directly. If so, P/S/A is responsible for tax letter. OSD/CCF can provide template for special language needed per IRS regs. If donor utilizes Archindy portal, processing, OSD will handle tax letter.</li> </ul>
<p><b>DAFs:</b></p> <p><b>3rd Party</b></p> 	<p><b>Jeri Friel</b> Donor Relations Coordinator (317) 236-1415 jfriel@archindy.org</p>	<p><b>Creating new:</b> depends on custodian co. <b>Add to existing:</b> any \$</p> <p><b>Now:</b> Cash, securities, proceeds from personal property or real estate</p> <p><b>Deferred:</b> Bequests, retirement plan assets (beneficiary), life insurance policy (beneficiary)</p> <p><i>*per IRS regs, DAFs can't be funded by/receive \$ from QCDs ('RMD gifts')</i></p>	<ul style="list-style-type: none"> <li><b>DAF grants must be made to a 501c3</b> (and cannot provide a personal benefit to donor nor to a specific individual)</li> <li>DAF grants can't be used to establish a CGA</li> <li>DAF grant check, memo line, and cover letter <b>should not refer</b> to a specific 'campaign' or 'pledge', per IRS rules (even if it is understood between donor &amp; P/S/A as fulfilling a non-legally binding pledge, like a capital campaign)</li> </ul>	<ul style="list-style-type: none"> <li>Easy to establish, flexible, hands-on for donor</li> <li>Acts like a 'charitable investment account'</li> <li>Avoids capital gains tax for appreciated assets, maximizing gift impact and providing full-market value tax deduction</li> <li>Income tax deduction per gift added.</li> <li>Compatible with 'charitable bunching' strategy, more popular now with the raised standard deduction</li> <li>Advised distributions (grants) not limited to 5%</li> <li>Utilizes power of compound interest/the market</li> </ul>	<ul style="list-style-type: none"> <li>Donor can utilize Archindy's "Grant DAF gift through your broker" instructions at: <a href="http://www.archindy.org/DAFgrantrequest">www.archindy.org/DAFgrantrequest</a></li> <li>If donor utilizes Arch processing, there is no fee and <b>P/S/A receives 100% of gift</b></li> <li>Gift acknowledgment letter requires special wording to comply with IRS regs. Please see next block*</li> </ul>	<ul style="list-style-type: none"> <li>Donor can utilize Archindy's "Grant DAF gift through your broker" instructions at: <a href="http://www.archindy.org/DAFgrantrequest">www.archindy.org/DAFgrantrequest</a></li> <li>If donor utilizes Arch processing, there is no fee and <b>P/S/A receives 100% of gift</b></li> <li>Gift acknowledgment letter requires special wording to comply with IRS regs. Please see next block*</li> </ul>	<ul style="list-style-type: none"> <li>Same as above, but connecting to Archindy's DAF Donation Page: (<a href="http://www.archindy.org/DAFgrantrequest">www.archindy.org/DAFgrantrequest</a>)</li> <li>Some donors will inevitably have DAF custodian send gift checks to your P/S/A directly. If so, P/S/A is responsible for acknowledgment letter. OSD/CCF can provide template for special language needed per IRS regs. If donor utilizes Archindy portal, processing, OSD will handle acknowledgment letter.</li> </ul>
<p><b>Bequests</b></p> 	<p><b>Kim Pohovey</b> Director of Major and Planned Gifts (317) 236-1568 kpohovey@archindy.org</p>	<p>"Bequest" = a gift provision in donor's will or trust</p> <p><b>General</b> - specific \$ amount <b>Percentage</b> - fixed % of estate <b>Specific</b> - particular piece of property of estate (value of its liquidation) <b>Residual</b> - any estate assets that remain after all other gifts given, admin. costs + taxes paid <b>Contingent</b> - becomes gift only under certain circum., such as death or waiving of primary recipient</p> <p><b>* Beneficiary designations of retirement accounts and insurance policies are sub-categories of bequests and exist outside of probate/a person's estate. See below!</b></p>	<p>Per instructions of will and type of bequest</p> <ul style="list-style-type: none"> <li>* <i>Archdiocese and/or P/S/A may not serve as executor of estates, attorney-in-fact, nor trustee of any kind. This also includes Archdiocesan &amp; P/S/A staff, officers, and directors</i></li> </ul>	<ul style="list-style-type: none"> <li>Way to include passion/love for P/S/A as part of final 'word' of legacy</li> <li>Makes large charitable gift possible</li> <li>Easy, flexible, and revocable</li> <li>No out-of-pocket expense</li> <li>Donor retains use of assets throughout life</li> </ul>	<ul style="list-style-type: none"> <li>Letter of Representation = P/S/A signs to authorize Arch to process bequest for you</li> <li>Planned Gift Intention Form = Donor can utilize CCF's form to catalog gift intention with Archindy and P/S/A to ensure proper future processing and designations of gift: <a href="http://secure-acceptiva.com/?cst=HYYP1b">secure-acceptiva.com/?cst=HYYP1b</a></li> <li><b>*P/S/As will be notified of bequests to benefit their organization</b></li> </ul>	<ul style="list-style-type: none"> <li>Same as above, but connecting to CCF's "Charitable Planned Gift Intention Form" Page: <a href="http://secure-acceptiva.com/?cst=HYYP1b">secure-acceptiva.com/?cst=HYYP1b</a></li> <li>Loop OSD/CCF in as soon as possible. We can provide proper and full bequest gift processing, legal counsel to ensure full gift is being received, taking nuanced and sometimes difficult task off your plate</li> <li><b>This is a pure service and there is no fee = P/S/A receives 100% of gift.</b></li> </ul>	<ul style="list-style-type: none"> <li>Same as above, but connecting to CCF's "Charitable Planned Gift Intention Form" Page: (<a href="http://secure-acceptiva.com/?cst=HYYP1b">secure-acceptiva.com/?cst=HYYP1b</a>)</li> <li>Loop OSD/CCF in as soon as possible. We can provide proper and full bequest gift processing, legal counsel to ensure full gift is being received, taking nuanced and sometimes difficult task off your plate</li> <li><b>This is a pure service and there is no fee = P/S/A receives 100% of gift.</b></li> </ul>
<p><b>Retirement Plans*</b></p> 	<p><b>Jim Maslar</b> Catholic Philanthropic Advisor (317) 236-1588 jmaslar@archindy.org</p>	<p>Donor designates P/S/A as a/the beneficiary of 401k, 403b, IRA, 457, TSP, etc. with the retirement plan custodian company (i.e. Fidelity, Vanguard, OneAmerica, etc.). This most often can be done on their webpage through the customer's account portal.</p>	<p>Depends upon beneficiary status; P/S/A may be named as:</p> <ul style="list-style-type: none"> <li><b>Primary*</b> - if recipient is alive/exists, they receive asset</li> <li><b>Secondary</b> - if primary is deceased or refuses, they receive asset</li> <li><b>Partial</b> - a chosen % of the asset's value (ex. 90% to children; 10% to parish)</li> <li><i>*Requires spouse's signature approval, if alive.</i></li> </ul>	<ul style="list-style-type: none"> <li>Easiest way to make a planned gift to your P/S/A</li> <li>Makes large charitable gift possible</li> <li>P/S/A can be considered another "child" beneficiary</li> <li>No immediate out-of-pocket expense</li> <li>Income not taxable to charities (but is to heirs)</li> <li>Does not go through probate</li> </ul>	<ul style="list-style-type: none"> <li>Letter of Representation = P/S/A signs to authorize Arch to process gift for you</li> <li>Custodian Paperwork = retirement or insurance co. will mail special paperwork to named beneficiary (whether P/S/A or Archindy); copy of death certificate and special Medallion Signature often needed</li> <li>Planned Gift Intention Form = see box above</li> <li><b>*P/S/As will be notified of retirement/insurance intentions received to benefit their organization</b></li> </ul>	<ul style="list-style-type: none"> <li>Same as above, but connecting to CCF's "Charitable Planned Gift Intention Form" Page: (<a href="http://secure-acceptiva.com/?cst=HYYP1b">secure-acceptiva.com/?cst=HYYP1b</a>)</li> <li>Loop OSD/CCF in as soon as possible. We can provide proper and full retirement/insurance gift processing, Medallion signature, legal counsel to ensure full gift is being received, taking nuanced and sometimes difficult task off your plate. <b>This is a pure service and there is no fee = P/S/A receives 100% of gift.</b></li> </ul>	<ul style="list-style-type: none"> <li>Same as above, but connecting to CCF's "Charitable Planned Gift Intention Form" Page: (<a href="http://secure-acceptiva.com/?cst=HYYP1b">secure-acceptiva.com/?cst=HYYP1b</a>)</li> <li>Loop OSD/CCF in as soon as possible. We can provide proper and full retirement/insurance gift processing, Medallion signature, legal counsel to ensure full gift is being received, taking nuanced and sometimes difficult task off your plate. <b>This is a pure service and there is no fee = P/S/A receives 100% of gift.</b></li> </ul>
<p><b>Life Insurance*</b></p> 	<p><b>Kim Pohovey</b> Director of Major and Planned Gifts (317) 236-1568 kpohovey@archindy.org</p>	<p><b>*If donor is naming Arch or P/S/A as holder for new/existing policy:</b></p> <ul style="list-style-type: none"> <li>Donor gifts paid-up insurance policy; or</li> <li>Donor intends to continue making premium payments (which are tax deductible) on behalf of Arch or P/S/A</li> </ul> <p><b>*If donor naming Arch or P/S/A as beneficiary of new/existing policy:</b></p> <ul style="list-style-type: none"> <li>Can be listed as primary, partial, secondary, or contingent beneficiary</li> </ul>	<p>Depends upon beneficiary status; P/S/A may be named as:</p> <ul style="list-style-type: none"> <li><b>Primary*</b> - if recipient is alive/exists, they receive asset</li> <li><b>Secondary</b> - if primary is deceased or refuses, they receive asset</li> <li><b>Partial</b> - a chosen % of the asset's value (ex. 90% to children; 10% to parish)</li> <li><i>*Requires spouse's signature approval, if alive.</i></li> </ul>	<ul style="list-style-type: none"> <li>Makes large charitable gift possible, especially with a no-longer-needed policy</li> <li>P/S/A can be considered another "child" beneficiary</li> <li>No immediate out-of-pocket expense</li> <li>Can be a wealth replacement tool paired w/ CRT</li> <li>Annual premium payment is tax deductible (if charity is the policyholder)</li> <li>Policy replacement value (or basis, if less) = tax deduct</li> </ul>	<ul style="list-style-type: none"> <li>Letter of Representation = P/S/A signs to authorize Arch to process gift for you</li> <li>Custodian Paperwork = retirement or insurance co. will mail special paperwork to named beneficiary (whether P/S/A or Archindy); copy of death certificate and special Medallion Signature often needed</li> <li>Planned Gift Intention Form = see box above</li> <li><b>*P/S/As will be notified of retirement/insurance intentions received to benefit their organization</b></li> </ul>	<ul style="list-style-type: none"> <li>Same as above, but connecting to CCF's "Charitable Planned Gift Intention Form" Page: (<a href="http://secure-acceptiva.com/?cst=HYYP1b">secure-acceptiva.com/?cst=HYYP1b</a>)</li> <li>Loop OSD/CCF in as soon as possible. We can provide proper and full retirement/insurance gift processing, Medallion signature, legal counsel to ensure full gift is being received, taking nuanced and sometimes difficult task off your plate. <b>This is a pure service and there is no fee = P/S/A receives 100% of gift.</b></li> </ul>	<ul style="list-style-type: none"> <li>Same as above, but connecting to CCF's "Charitable Planned Gift Intention Form" Page: (<a href="http://secure-acceptiva.com/?cst=HYYP1b">secure-acceptiva.com/?cst=HYYP1b</a>)</li> <li>Loop OSD/CCF in as soon as possible. We can provide proper and full retirement/insurance gift processing, Medallion signature, legal counsel to ensure full gift is being received, taking nuanced and sometimes difficult task off your plate. <b>This is a pure service and there is no fee = P/S/A receives 100% of gift.</b></li> </ul>