



Request for Free Donor Gift Illustration

Fax to 530-470-0909

To: Edward W. Cotney (530) 913-0562
Director, Client and Philanthropic Services

From: _____ Organization: _____

Phone: _____ Fax: _____ E-Mail _____

Current Gift Illustration Requested: Gift/Sale Bargain Sale Gift and Redemption
(Determine if donor is seeking reduced tax % or zero tax illustration)

Planned Gift Illustration Requested: CRAT CRUT Education Unitrust Life Estate
 Bequests Lead Trust IRA Rescue Plan NIMCRUT Charitable Gift Annuity
 Testamentary Gift Plans Other – Explain _____

Type of Asset: Cash Stock Real Estate Other _____

Cost Basis _____ Fair Market Value _____

Date of Purchase _____ If Real Estate, Any Debt? \$ _____

Donor Name: _____ Birth date (M/D/Y) _____

Spouse Name: _____ Birth date (M/D/Y) _____

Estimated St/Fed Income Tax Bracket ____% Estimated Estate Tax Bracket ____%

State of Residency: _____ If a Trust, will you need legal documents? Yes / No

Charitable Beneficiary: _____

Charity Address/Contact: _____

Comments: _____

Date/Signature of Requestor: _____/_____