



Charitable Gift Annuity Notice Form

Demographic Information

Organization Legal Name:

Principle address:

State where organized:

Primary Contact Name:

Primary Contact Email:

Initial Notice to the Commissioner

On or before ninety (90) days after it issues its first charitable gift annuity contract, the charitable organization shall notify the Insurance Commissioner in writing that it has issued one or more charitable gift annuities. This notice shall be signed by an officer or director of the charitable organization. Officer or Director shall certify the following by initialing each requirement.

Certify that the organization is an organization described in Section 501(c)(3) and Section 170(c) of the Internal Revenue Code (IRS).

Certify that the charitable organization has issued one or more charitable gift annuity contracts and that these charitable gift annuity contracts are qualified charitable gift annuity contracts as defined in the Oklahoma Charitable Gift Annuity Act.

Certify that the charitable organization has a minimum of One Hundred Thousand Dollars (\$100,000.00) in unrestricted assets exclusive of the assets comprising the qualified charitable gift annuities issued by the charitable organization.

Required documents:

- 1) Attach a copy of the organization's letter from the Internal Revenue Service declaring its exempt status
- 2) Attach the most recent annual audit of the charitable organization prepared by an independent certified public accountant or accounting firm or individual holding a permit to practice public accounting in accordance with generally accepted accounting principles.
- 3) Attach copies of the Qualified charitable gift annuity promotional literature, application, and Agreement. The literature, application and agreement must have a separate paragraph in print no smaller than that employed in the document stating:

“A charitable gift annuity is not regulated by the Oklahoma Insurance Department and is not protected by a guaranty association affiliated with the Oklahoma Insurance Department.”



Annual Requirements

Complete the demographic section of this form and submit it along with the following document(s).

- 1) Each qualified charitable organization issuing qualified charitable gift annuities shall provide the Insurance Commissioner with a copy of its annual audited financial statement prepared by an independent certified public accountant or an accounting firm or individual holding a permit to practice public accounting in accordance with generally accepted accounting principles within ninety (90) days of receipt of the final audit report by the qualified charitable organization.
- 2) Amendments - attach copies of any amended Qualified charitable gift annuity promotional literature, application, and Agreement. The literature, application and agreement must have a separate paragraph in print no smaller than that employed in the document stating:
“A charitable gift annuity is not regulated by the Oklahoma Insurance Department and is not protected by a guaranty association affiliated with the Oklahoma Insurance Department.”

This notice is required annually and shall be signed by an officer or director of the charitable organization.

Officer/Director Full Name:

Title:

Date:

Contact the RIS division should you need assistance at ris@oid.ok.gov.