



CHARITABLE GIFT ANNUITIES

Initial & Renewal Registration Form

Section 1 - Demographics

Legal Name of CGA Entity: _____ FEIN: _____

Principal Address: _____

Mailing Address: _____

Primary Contact Name: _____

Contact Phone #: _____ Contract Email: _____

Section 2 - Certification *Owner or Officer Must Initial Each Item to Certify

1. The organization meets the definition as described in Section 501(c)(3) and Section 170(c) of the Internal Revenue Code (IRS) - **Include a copy of the IRS tax exemption letter for the CGA entity's initial filing.**
2. The CGA's name registration is compliant with Oklahoma Secretary of State (sos.ok.gov/business/).
3. The organization has a minimum of \$100,000 in unrestricted assets exclusive of assets comprising of qualified charitable gift annuities issued by the organization.
4. Verification the company has been in continuous operation for at least three (3) years or is a successor of and affiliate of a charitable organization that has been in continuous operation for at least three years.

Section 3 - Initial & Annual Requirements *Owner or Officer Must Initial Each Item to Acknowledge

CGA is compliant with the Oklahoma Secretary of State registration under Title 18 (sos.ok.gov/business/)

A copy of the CGA's annual audited financial statement prepared by an independent certified public accountant (CPA) or an accounting firm or individual holding a permit to practice public accounting in accordance with generally accepted accounting principles (GAAP), certified within ninety (90) days of receipt of the final audit report by the qualified charitable organization.

A copy or copies of original or amended Qualified Charitable Gift Annuity promotional literature, application(s), and Agreement(s) must be submitted with the OK Initial application, OK Renewal application at any time upon amendment. The literature, application and agreement(s) 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."

Section 4 - Attestation

Owner/Officer Full Legal Name: _____

Title: _____

Owner/Officer Signature: _____ Date: _____