

Charitable Gift Annuities Product Outline

Summary of Changes

(Last Updated February 6, 2019)

1. Section III.A. has been revised to further indicate that forms must be filed in the form intended for actual issue.
2. Section III.B.7 has been revised to clarify third-party authorization requirements for consistency with other posted Department product outlines.
3. Section III.C.8.b. has been revised to further note that Schedule A property description pages, should be drafted with bracketed language which allows a specific description of the gifted property at the point of issue.