



**STATE OF WEST VIRGINIA  
Offices of the Insurance Commissioner  
Company Analysis and Examinations Division**

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**Notification to the WV Offices of the Insurance Commissioner  
of the Issuance of a Qualified Charitable Gift Annuity**

Organization Name: \_\_\_\_\_  
FEIN # \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
Contact Person: \_\_\_\_\_  
E-Mail: \_\_\_\_\_  
Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Pursuant to the provisions of W. Va. Code §33-13b-4, the organization identified above hereby notifies the West Virginia Offices of the Insurance Commissioner that it issues or intends to issue qualified charitable gift annuities.

The undersigned officer or director certifies that the organization identified above: (1) is a “charitable organization” as defined in 26 U.S.C. §501(c)(3) or 26 U.S.C. §170(c) (a copy of the IRS determination letter is attached); (2) has been in continuous operation for at least three years or is a successor or affiliate of a charitable organization that has been in existence for at least three years; and, (3) will have, as of the date of each annuity agreement entered into after June 30, 2006, a minimum of \$300,000 in unrestricted cash, cash equivalents or publicly traded securities, exclusive of the assets funding the annuity agreement. The undersigned officer or director further certifies that the charitable gift annuities issued by such organization are “qualified charitable gift annuities” as defined in 26 U.S.C. §501(m)(5) and 26 U.S.C. §514(c).

The undersigned officer or director agrees that each agreement for the issuance of a qualified charitable gift annuity executed after June 30, 2006, will contain, in a separate paragraph and in a print size not smaller than that employed in the annuity agreement generally, the following disclosure to the donor:

“A qualified charitable gift annuity is not insurance under the laws of West Virginia, is not subject to regulation by the West Virginia Offices of the Insurance Commissioner, and is not protected by the West Virginia Life and Health Insurance Guaranty Association established in Article 26A, Chapter 33 of the West Virginia Code or by any other guaranty association established by the West Virginia Code.”

Name (print or type): \_\_\_\_\_  
Title: \_\_\_\_\_  
Signature: \_\_\_\_\_  
Date: \_\_\_\_\_

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**Accredited by the National Association of Insurance Commissioners**