

**NOTIFICATION TO THE NORTH CAROLINA
DEPARTMENT OF INSURANCE AS AN ISSUER OF A
CHARITABLE GIFT ANNUITY PURSUANT TO NCGS 58-3-6**

Attention: Life & Health Division 1201 Mail Service Center . Raleigh, NC 27699-1201

*Organization or
Institution Name*

Address

State, Zip

Phone & Fax

Contact Person

Pursuant to the provisions of NCGS 58-3-6, the organization or institution identified above hereby notifies the North Carolina Department of Insurance that it is a charitable organization or educational institution as defined therein. Per NCGS 58-3-6(a), the issuance of an annuity by the charitable organization does not constitute engaging in the business of insurance because, when an annuity agreement is issued, the charitable organization:

- (1) Has a minimum of \$100,000 in unrestricted cash, cash equivalents, or publicly-traded securities, exclusive of the assets contributed by the donor in return for the annuity agreement;
- (2) Has been in active, continuous operation for at least three years or is a successor to or affiliate of a charitable organization that has been in active operation for at least three years; and
- (3) Includes the following disclosure clause in each annuity agreement issued on or after November 1, 1998: "This annuity is not issued by an insurance company, is not subject to regulation by the State of North Carolina, and is not protected or otherwise guaranteed by any government agency or insurance guaranty fund."

*Officer or
Director*

Print or Type

Signature

Date