



## COMPLEX ASSET GIFT QUESTIONNAIRE

First Donor Full Name

\_\_\_\_\_

Second Donor Full Name (if applicable)

\_\_\_\_\_

### ASSET INFORMATION

Full legal name of asset owner(s): \_\_\_\_\_

Asset type (check all applicable types):

- Real estate (complete *Real Estate Gift Questionnaire*)
- Crops/farm equipment
- C-Corp closely-held stock
- Limited partnership
- Other: \_\_\_\_\_
- S-Corp closely-held stock
- General partnership
- Limited liability company

Type of business: \_\_\_\_\_

Estimated value of donor's total ownership: \$ \_\_\_\_\_

How was this value determined? \_\_\_\_\_

What portion of the asset is the donor giving? \_\_\_\_\_

How long has this asset been owned by the donor? \_\_\_\_\_

Donor's cost basis: \$ \_\_\_\_\_

How did the donor acquire this asset? \_\_\_\_\_

Is there a deadline for completing this gift?

- No
- Yes, deadline: \_\_\_\_\_

Are there any potential buyers for this gift asset?

- No
- Yes (please describe): \_\_\_\_\_

Is there any debt associated with this gift asset?

- No
- Yes (amount & age of debt): \_\_\_\_\_

If the gift is corporate business interests, what is the name and contact information of the business' CPA or CFO?

\_\_\_\_\_  
\_\_\_\_\_

continued, over

## NEXT STEPS

Please include the following documents with this questionnaire.

### REAL ESTATE

Please complete InFaith's *Real Estate Questionnaire*.

### CORPORATION

- Most recent corporate financial statement
- Most recent federal tax return
  - Form 1120S and K-1 for S-Corporations*
  - Form 1120 for C-Corporations*
- Articles of Incorporation
- Bylaws
- List of shareholders & number of shares owned
- Valuation/appraisal (if available)
- Shareholder agreement and amendments

### LIMITED PARTNERSHIP

- Most recent financial statement
- Most recent federal tax return (Form 1065 & K-1)
- Certificate of limited partnership formation
- Partnership agreement with amendments
- List of members and units, or percentage owned
- Valuation/appraisal (if applicable)

### LIMITED LIABILITY COMPANY

- Most recent financial statement
- Most recent federal tax return (Form 1065 & K-1)
- Articles of Organization
- Operating agreement with amendments
- List of members and units, or percentage owned
- Valuation/appraisal (if applicable)

By signing this document, I understand that InFaith Community Foundation will be relying on the truth and accuracy of my answers to the questions in accepting my gift. I certify that each of the answers is true, accurate and complete to *the best of my knowledge*.

\_\_\_\_\_

Signature

\_\_\_\_\_

Date

\_\_\_\_\_

Signature

\_\_\_\_\_

Date

## QUESTIONS?

Call InFaith at 800-365-4172.

Please send this document and any supporting documents by mail or fax to the contact information below:

InFaith Community Foundation  
Attn: InFaith Charitable Giving Services  
625 Fourth Avenue South, Suite 1500  
Minneapolis, Minnesota 55415  
Phone: 800-365-4172 or fax: 612-844-4109

*Charitable giving can result in significant tax, legal and financial consequences. Because InFaith Community Foundation cannot give tax or legal advice, you are strongly encouraged to consult with your personal tax and legal advisors. To ensure compliance with IRS requirements, be aware that any U.S. federal tax advice that may be contained in this brochure is not intended to be used, and cannot be used, for the purpose of (i) avoiding penalties under the Internal Revenue Code or (ii) promoting, marketing and recommending another party to any transaction or matter addressed herein.*

InFaith Community Foundation is a national charity with a mission to serve donors, spread joy and change lives. Through InFaith, giving is customized to each donor's charitable interests and financial circumstances. InFaith is a proven steward of these gifts, earning consistently high ratings from Charity Navigator and GuideStar for sound fiscal management, transparency and commitment to excellence. Together with donors, InFaith grants millions of dollars annually to charities serving local, national and global communities. To learn more, visit [inFaithFound.org](http://inFaithFound.org).