



CENTER FOR FINANCIAL PLANNING



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Managing Director, Development
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Milton Stern Scholars Fund Donation Form

I. DONATION INFORMATION

I'd like to make a one-time donation in the amount of \$_____.

I'd like to make a multi-year pledge totaling \$_____.

Schedule (check only one): Annually Semi-Annually Quarterly, beginning (date) _____

Payable over (check only one): Five Years Other (please indicate) _____

Please complete payment schedule chart below to ensure reminder notices are sent on time.

Table with 5 columns: Year, Q1 (Date & Amount), Q2 (Date & Amount), Q3 (Date & Amount), Q4 (Date & Amount). Rows for years 2018, 2019, 2020, 2021, 2022.

II. METHOD OF PAYMENT

Enclosed Check (make payable to the Milton Stern Scholars Fund, CFP Board)

Amount enclosed: _____ Check Number: _____

Credit Card (check only one): [] MasterCard [] Visa [] American Express

Amount to charge: _____ Credit card #: _____ CVV: _____

Name on card: _____

Billing Address: _____

Billing City, State, Zip: _____

Billing Phone: _____

Expiration date: _____

Other (such as securities, from your donor advised fund, etc.) Contact Diane LaVigna, CFRE at dlavigna@cfpboard.org for instructions.

III. CONTACT INFORMATION

Name: _____

Business name: _____

Job title: _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

IV. Please indicate how you would prefer to be listed for recognition purposes:

I wish to remain anonymous

SIGNATURE

DATE

Please send your completed and signed donation form by email or hard copy to Rochelle Zeidman at the address listed above.

The Certified Financial Planner Board of Standards, Inc. is a non-profit charitable organization under Section 501 (c)(3). Contributions to the CFP Board may be deductible as a charitable contribution for Federal Income Tax purposes. Please consult your tax advisor.