

DONATION FORM

Donation Type: Multi-Year Pledge One-Time Gift **Date:** _____

I/we intend to support the CFP Board Center for Financial Planning with a total commitment of:

- \$250,000 Chairs Circle \$100,000 Pinnacle Circle \$50,000 Leaders Circle \$25,000 Benefactors Circle
 \$10,000 Presidents Circle \$5,000 Champions Circle \$1,000 Patrons Circle Other _____

MULTI-YEAR PLEDGE INFORMATION

My/our pledge is payable over _____ years.

Annual Semiannual Quarterly pledge payments of \$ _____ will begin ____ / ____ (month/year).

Additional pledge payment instructions: _____

Signature: _____ Date: _____

DONOR INFORMATION

Full Name(s): _____

Company: _____ Title: _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

Please indicate how you prefer to be listed for donor recognition purposes:

I/we prefer not to be publicly recognized for this donation and wish to be anonymous.

PAYMENT INFORMATION

Check: Payable to the CFP Board Center for Financial Planning, 1425 K St NW #800 Washington, DC 20005

Credit Card: Card Number: _____
Expiration Date _____ CVV Code: _____

For gifts through a donor advised fund, stock transfer or IRA, contact the Development Team at 202.379.2237 or DevelopmentTeam@CFPBoard.org.

Please consider including the CFP Board Center for Financial Planning in your estate plan. Legacy Donors provide long-lasting support ensuring the vitality and sustainability of the financial planning profession to benefit the public.

I would like to learn more about becoming a Legacy Donor. I have included the Center in my estate plan.

CONTACT INFORMATION

Diane LaVigna, CFRE, Director of Development | dlavigna@cfpboard.org | 202-379-2255; or
Beth Miller, Individual Giving Officer | bmiller@cfpboard.org | 202-864-5202

The Center for Financial Planning is a distinct initiative of CFP Board which is a 501 (C) (3) nonprofit organization (Tax ID# 74-2385850). Donations are tax deductible to the extent allowed by law.