

Thank you for your interest in supporting CFP Board Center for Financial Planning. In addition to making a secure online gift, we offer several other convenient ways to give.

DONATE BY WIRE TRANSFER OR ACH

Wire transfers and ACH payments are secure and efficient options for larger or time-sensitive gifts.

To initiate a Wire or ACH transfer:

- Please contact donations@cfpboard.org to request our banking instructions.
- For security reasons, we do not publish account information online.
- Here is information you will need to include with your transfer:
 - Donor name
 - Gift amount
 - Gift designation (e.g., Center for Financial Planning, specific program)
 - Any special instructions (e.g., pledge payment, tribute)
- It is recommended that you notify us once your transfer has been initiated, so we can confirm receipt.

DONATE BY MAIL

To send a gift by check:

- Make your check payable to: CFP Board Center for Financial Planning
- Memo Line: [indicate any specific gift designation]
- Mail to:
 - CFP Board Center for Financial Planning
 - Attn: Development Team
 - 1425 K St NW #800
 - Washington, DC 20005
- Additional Information:
 - Tax ID (EIN): 74-2385850
 - If your gift is in honor of / memory of someone, please indicate their name.

For your records, we encourage you to keep a copy of your check and retain your acknowledgment letter for tax purposes.

DONATE THROUGH A DONOR-ADVISED FUND

If you have a donor-advised fund (DAF), you can recommend a grant to CFP Board Center for Financial Planning.

How to recommend a DAF grant:

- Log into your DAF provider's website or by contacting your DAF administrator.
- Search for our organization using:
 - Legal Name: Certified Financial Planner Board of Standards Center of Financial Planning Inc.
 - Note in some DAF menus it shows up as just CFP Board.
 - Tax ID (EIN): 74-2385850
- Recommend the grant in the amount of your choice.
- Include your name and indicate any intended gift designation so we can properly acknowledge your support.

Many DAF providers allow you to set up recurring grants for ongoing support. If you would like to do so, please discuss this with your provider.

MAKE A QUALIFIED CHARITABLE DISTRIBUTION (IRA GIFT)

If you are age 70½ or older, you may be eligible to make a Qualified Charitable Distribution (QCD) directly from your IRA.

Benefits of an IRA gift:

- May satisfy all or part of your Required Minimum Distribution (RMD)
- May reduce your taxable income

How to make an IRA gift:

- Contact your IRA custodian and request that a QCD be sent directly to us.
- Make the distribution check payable to:
- Recommend the grant in the amount of your choice.
 - Legal Name: Certified Financial Planner Board of Standards Center of Financial Planning Inc.
 - Mailing address:
CFP Board Center for Financial Planning
Attn: Development Team
1425 K St NW #800
Washington, DC 20005
 - Tax ID (EIN): 74-2385850
 - Gift Designation (e.g., Center for Financial Planning, specific program)
- Please notify us of your gift so we can confirm receipt and properly acknowledge your support.

We recommend consulting your financial or tax advisor to determine how an IRA gift may apply to your specific situation.

GIVE A GIFT OF SECURITIES

Donating appreciated securities — such as stocks, bonds and mutual funds — may provide significant tax advantages while making a meaningful impact on CFP Board Center for Financial Planning.

How to make a securities gift:

- Request our transfer instructions by contacting donations@cfpboard.org.
 - For security reasons, we do not publish account information online.
- Contact your broker or financial advisor to initiate the transfer.
- Please notify us when the transfer is initiated and include:
 - Donor name and contact information
 - Date of transaction
 - Type and name of security
 - Number of shares
 - Intended gift designation

We recommend consulting your financial or tax advisor to determine how a gift of securities may benefit your specific situation.

PLANNED GIVING

A planned gift to CFP Board Center for Financial Planning allows you to create a lasting legacy while advancing a more diverse, sustainable and accessible financial planning profession for generations to come.

Ways to include CFP Board Center for Financial Planning in your plans:

- Request in your will or trust.
- Beneficiary designation (e.g., retirement accounts, life insurance policies, DAFs).
- Other legacy planning vehicles.

If you have already included CFP Board Center for Financial Planning in your plans, we would be honored to know so we can thank you and ensure your intentions are understood.

To discuss planned giving options, please contact donations@cfpboard.org.

We recommend working with your attorney or financial advisor to determine the best option for your goals.