

# 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: \$ \_\_\_\_\_

Purpose of Donation (if other than general program support): \_\_\_\_\_

## 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 one of the development team members listed below.

**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

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