## 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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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.