

INDIVIDUAL 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

Online: Donate securely online: <https://www.cfp.net/donate>

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