



P.O. Box 278383  
Sacramento, CA 95827  
(916) 875-6460  
Fax (916) 875-6879  
www.sacramentocasa.org  
SacramentoCASA   
CASA\_Sacramento

1991 – 2016 | Celebrating 25 Years of Service

## Legacy Society Planned Giving Commitment Form

In recognition of my/our commitment to leave a legacy and support CASA Sacramento's mission after my/our lifetime, I/we are pleased to inform CASA Sacramento that I/we have included CASA Sacramento in my/our estate plans.

Name(s) \_\_\_\_\_

Address ( preferred form of contact) \_\_\_\_\_

Email ( preferred form of contact) \_\_\_\_\_ Phone \_\_\_\_\_

- Please include my/our name(s) as a member of the CASA Sacramento Legacy Society.       I/we wish to remain anonymous.

### I/we have included CASA Sacramento in my estate plan through my/our

- Will       Charitable Remainder Trust  
 Living Trust       Life Insurance Policy  
 Retirement Plan/IRA  
 Real Estate (please describe) \_\_\_\_\_  
 Other asset(s): \_\_\_\_\_

Additional information: \_\_\_\_\_  
\_\_\_\_\_

My gift is for (please include percentage of your gift distribution to total 100%):

- Unrestricted (CASA Sacramento may use at their discretion): \_\_\_\_\_ % (approx. value \$ \_\_\_\_\_)  
 Restricted to Making Memories: \_\_\_\_\_ % (approx. value \$ \_\_\_\_\_)  
 Restricted to \_\_\_\_\_: \_\_\_\_\_ % (approx. value \$ \_\_\_\_\_)

**I/we understand this letter is not a legal obligation and may be changed at my/our discretion at any time.**

Name \_\_\_\_\_

Name \_\_\_\_\_

Signature \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

Date \_\_\_\_\_

**Our Mission:** To ensure consistency and support for children in the foster care system through the use of volunteer advocates advancing the best interests of each child.

**Court Appointed Special Advocates of Sacramento County**  
**Legacy Society**  
**Planned Giving Commitment Form**

1991 – 2016 | Celebrating 25 Years of Service

**Legal Documentation**

Although not necessary for membership in CASA Sacramento’s Legacy Society, providing legal documentation of your planned gift will help CASA Sacramento as we build a brighter future for Sacramento County foster youth. If possible, please provide either a copy of the relevant portion of the legal document(s) in which your gift is described, or a letter from you or your financial or legal advisor describing your future gift to CASA Sacramento.

**Disclaimers**

- Completion of this form is not intended to be legally binding, but notification of intent.
- CASA Sacramento cannot render financial or legal advice.
- Please consult with a professional financial or legal advisor before making a charitable gift.

**Proper Designation Language**

In legal documents intending to name CASA Sacramento as a beneficiary of a planned gift, the proper wording is “to Court Appointed Special Advocates of Sacramento County, P.O. Box 278383, Sacramento, CA 95827.”

**Tax-Exempt Status**

CASA Sacramento is a tax-exempt nonprofit organization recognized by section 501(c)(3) of the Internal Revenue Code. Tax ID #68-0257139. Contributions are deductible as allowed by law.

**Confidentiality**

All information provided will be kept in the strictest confidence and will be used for internal planning purposes only. Thank you.

**Submission Details**

Please return form to:  
Elizabeth Morabito, Development Director  
CASA Sacramento  
P.O. Box 278383, Sacramento, CA 95827  
(916) 875-3010, elizabeth@sacramentocasa.org

*Our Mission: To ensure consistency and support for children in the foster care system through the use of volunteer advocates advancing the best interests of each child.*