

1991 – 2020 | Celebrating 29 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:

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

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

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."

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

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:
Crystal Burns, Community Relations & Development Director
CASA Sacramento
P.O. Box 278383
Sacramento, CA 95827
crystal@sacramentocasa.org
(916) 875-4443

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.