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SacramentoCASA   
CASA\_Sacramento 

Established 1991

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

*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 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  
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**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:  
Matthew Romsa, Donor Relations Director  
CASA Sacramento  
P.O. Box 278383  
Sacramento, CA 95827  
matthewr@sacramentocasa.org  
(916) 875-0163