**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

Living Trust

Retirement Plan/IRA

Charitable Remainder Trust

Life Insurance Policy

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*

*Signature*

*Date*

*Name*

*Signature*

*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.”

**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