



P.O. Box 101208, Denver, CO 80250-1208

DONOR RECORD FORM for the Legacy Partner program:

Name of Donor: _____

Name for listing on CPGR materials (include spouse if applicable):

Preferred Address: _____

Phone Numbers: Cell _____ Work _____

Email address: _____

I have made provision for Colorado Planned Giving Roundtable (CPGR) in my estate plans as follows:

- Bequest in Will
 - Of a specific sum in the amount of \$_____.
 - Percentage of estate in the following percentage: _____
 - Contingent Remainder Bequest
- Beneficiary of a retirement plan with appropriate documentation attached
- Beneficiary of a Life Insurance Policy with appropriate documentation attached
- Charitable Remainder Trust with appropriate documentation attached
- Component part of Fund: A Foundation will hold the principal and provide income to CPGR

- Copy of the pertinent section of my will or other type of planned gift is attached.

I intend the gift to be: unrestricted and proceeds will go into CPGR's endowment fund to be used for general purposes
 restricted and used for the following purpose:

- I would like to become a member of CPGR's Legacy Partner program. I give my permission to publish my name in any written material as listed above.
- I would like to be a member of CPGR's Legacy Partner program, but I would like to remain anonymous.

Signature of Donor: _____ Dated _____

Date of Birth: _____

Please return this form to the attention of Tina Drum, Executive Director for CPGR at the above-mentioned address. For questions please contact Tina at 303-932-2764, cpgr@q.com.