



Investing in the Future

## Planned Giving Declaration of Intent



I am/We are pleased to participate in the development efforts of The Ohio CPA Foundation. As an expression of my/our desire to help advance the CPA profession, I/we have included a gift to The Ohio CPA Foundation through a:

- ☐ Will
- ☐ Trust
- ☐ Life Insurance Policy
- ☐ IRA/Other retirement assets
- ☐ Securities
- ☐ Bank Account
- ☐ Other (please describe): \_\_\_\_\_

My/our gift is currently valued at:

- ☐ \$ \_\_\_\_\_
- ☐ a percentage of my estate's value (\_\_\_\_\_%)
- ☐ a part or all of the remainder of my estate (\_\_\_\_\_%)

I/we wish to direct my support to the following:

- ☐ Where The Ohio CPA Foundation's needs are greatest.
- ☐ For a specific purpose to be discussed (comments): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

☐ I/we would like to create a named endowment with our gift (only for gifts of \$25,000 or more).

☐ I/we would like to be recognized as a member(s) of the 1956 Legacy Society to help encourage others to make an exemplary commitment. I/we give permission to list my/our names as a member(s) of the 1956 Legacy Society (for recognition purposes only) with the understanding that the amount of my/our arrangement is strictly confidential. List my/our name(s) as:  
\_\_\_\_\_  
\_\_\_\_\_

☐ Although The Ohio CPA Foundation is currently included in my/our estate plans, I/we wish to remain anonymous.

***This Declaration of Intent is not a legal obligation and may be changed at my/our discretion at any time.***

\_\_\_\_\_  
Donor (Printed Name)

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Donor (Printed Name)

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Date