

PLANNED GIFT TRANSMITTAL FORM

DONOR INFORMATION

HARD CREDIT	ADDRESS	PHONE NUMBER
NAME:	(H):	(H):
CRM ID:	(W):	(W):
SOFT CREDIT	ADDRESS	PHONE NUMBER
NAME:	(H):	(H):
CRM ID:	(W):	(W):
OTHER CONTACT	ADDRESS	PHONE NUMBER
<input type="checkbox"/> Financial Manager/Attorney	(H):	(H):
<input type="checkbox"/> Beneficiary Relationship to donor::	(W):	(W):
NAME / FIRM:		
CRM ID:		

ANONYMOUS
(Donor's name will not be published or publicly recognized)

GIFT INFORMATION

<input type="checkbox"/> Revocable <input checked="" type="checkbox"/> Irrevocable	
<input type="checkbox"/> Testamentary Commitment <input type="checkbox"/> Bequest-Stocks/securities <input type="checkbox"/> Bequest-Cash <input type="checkbox"/> Bequest-Property <input type="checkbox"/> Annuity Trust <input type="checkbox"/> Charitable Remainder Trust <input type="checkbox"/> Charitable Gift Annuity <input type="checkbox"/> Charitable Lead Trust <input type="checkbox"/> Life Estate <input type="checkbox"/> Insurance Premium <input type="checkbox"/> Retirement Plan	

Amount	Solicitation Method	Solicitor Name	Amount of Solicitor Credit	Purpose / Designation	Designation Number

Documentation (required):
Statement of Intent is attached <input type="checkbox"/> Yes <input type="checkbox"/> No Will or other documentation is attached <input type="checkbox"/> Yes <input type="checkbox"/> No Proposal to Manage Constituent submitted? <input type="checkbox"/> Yes <input type="checkbox"/> No Solicitation Contact Report(s) submitted? <input type="checkbox"/> Yes <input type="checkbox"/> No
Comments/Details:

Quid Pro Quo Information:
Were any goods or benefits given in exchange for this gift? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, explain:

DEPARTMENT/DIVISION INFORMATION

PREPARED BY	TELEPHONE NUMBER	DATE PREPARED	COLUMNS SOCIETY MEMBER? <input type="checkbox"/> Yes <input type="checkbox"/> No
COMMENTS OR ADDITIONAL INFORMATION ON DONOR / GIFT.			