



## CPGR Legacy Partners Program Donor Record Form

I am pleased to inform the Colorado Planned Giving Roundtable (CPGR) that I have included CPGR in my will or future planning, preserving the work and mission of this organization for generations to come. I understand that my statement here is revocable and in no way obligates my estate or heirs.

Name: \_\_\_\_\_

Listing for publications: \_\_\_\_\_  
(include spouse, as appropriate)

Preferred address: \_\_\_\_\_

Phone Numbers: Cell \_\_\_\_\_ Work \_\_\_\_\_

Email address: \_\_\_\_\_

My gift to the Colorado Planned Giving Roundtable (please check all that apply) is through\*:

- My will or living trust with
  - \$ \_\_\_\_\_ (a specific amount) or  \_\_\_\_\_ % (a percentage of my estate)
- A beneficiary designation on my  retirement plan or  insurance policy.
- A charitable remainder trust or  charitable gift annuity.
- A private foundation or donor-advised fund.
- A current gift of \$ \_\_\_\_\_ to support the CPGR Endowment.
- Other: \_\_\_\_\_.
- CPGR is a contingent beneficiary. Notes: \_\_\_\_\_.

\* Please attach a copy of the will, beneficiary designation, or other paperwork, as appropriate.

The current estimated value of my estate gift is \$ \_\_\_\_\_.

I would like this gift to support:

- CPGR's endowment fund for general organizational needs.
- A designated fund for the following purpose: \_\_\_\_\_.

- CPGR may publish my name as a member of CPGR's Legacy Partners.
- I would like to be a CPGR Legacy Partner but prefer to remain anonymous.

Signature: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Date: \_\_\_\_\_

Please return this form to:  
Colorado Planned Giving Roundtable (CPGR)  
Attn: Tina Drum, Executive Director, P.O. Box 101208, Denver, CO 80250-1208  
Phone: 303-932-2764 | Email: [cpgr@q.com](mailto:cpgr@q.com) | Website: [cpgr.org](http://cpgr.org) | Tax ID #84-1241600