



## Declaration of Intent for Estate Gift Circle of Angels

I am pleased to accept membership into the Circle of Angels at the Center for Societal Aspiration (CSACO). I understand that my membership is based on the following confidential information. In order to properly acknowledge and record your gift, please provide the following information about your estate plan.

Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Spouse Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

### TYPE OF GIFT

It is my/our intent to provide a legacy to the CSACO (Tax ID:92-2284963) through my/our:

Bequest       Retirement Plan       Life Insurance Policy       Other: \_\_\_\_\_

### DESCRIPTION OF GIFT

Please describe your gift (percentage of estate, specific dollar amount, description of specific property, etc.):

I/we wish to inform the CSACO, for long-term planning purposes only, the estimated value of my/our gift, as of today, is \$ \_\_\_\_\_

*(If your gift is a percentage of your estate, please indicate the approximate present value of that percentage.)* It is understood that these statements and estimates are offered solely to assist CSACO in recording and project future financial support and gift expectancies. I/we understand that by stating an amount, this does not legally bind my/our estate, and I/we may choose to add, subtract or revoke this bequest at any time, at my/our sole discretion.

A copy of the provision is attached or will be sent when it is executed (optional).

### PURPOSE OF GIFT

This gift is to be used for the following purpose or program (percentages must total 100%):

\_\_\_\_\_ % To benefit the CSACO's operations

\_\_\_\_\_ % To benefit the CSACO's programs

### REASONS FOR GIVING

**What inspired you to leave a legacy gift to the Center for Societal Aspiration (CSACO)?**

**What aspect of the Center for Societal Aspiration's work gives you the most satisfaction?**

**Is there an important moment, person or special occasion that influenced your decision?**

**What result/impact/outcome do you hope your gift will achieve for the Center for Societal Aspiration?**

**How should your name appear in all recognitions?**

**Please indicate your preference:**

CSACO may announce and/or publish our names as a way of encouraging others to give.

I/we would like this planned gift to remain totally anonymous.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

***Thank you for your continued support and commitment! Please mail or e-mail to:***

Center for Societal Aspiration  
Development Department

5931 Greenville Ave, Unit #5570,  
Dallas, Texas 75206  
[development@csaandco.com](mailto:development@csaandco.com)