



In consideration of the impact First Circuit CASA has on the lives of children and families who have experienced abuse and/or neglect, I/we have made provisions for a gift to Compassion Delivered in my/our estate plans.

We acknowledge that First Circuit CASA Delivered is a 501(c)3 non-profit organization, EIN 46-0462671, and provide the following information so that you may have it for your records.

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

PHONE: \_\_\_\_\_ EMAIL: \_\_\_\_\_

**Gift information:** Please select the appropriate box regarding your estate plans for First Circuit CASA

- Will or trust provision
- IRA/Retirement plan beneficiary
- Life insurance beneficiary
- Donor-advised fund (DAF) successor beneficiary
- Other

**First Circuit CASA will receive this gift:**

- Upon my death
- Upon the death of the surviving spouse/partner
- Other

**This gift is designated to support:**

First Circuit CASA's greatest needs as determined by the Board of Directors (unrestricted)  
Please get in touch with me to discuss how my gift could be used

**Gift recognition:**

The following are attached to document my/our gift provision(s) to First Circuit CASA

- A copy of the will or trust provision
- A copy of the account beneficiary designation form, and summary page from a recent statement
- A letter from my attorney, executor, or trustee describing the gift provision
- Other



**Estate Contact Information (optional, but very helpful)**

Who would you like First Circuit CASA to contact upon your death to facilitate the distribution of your gift?

- Executor
- Trustee
- IRA Custodian/Plan administrator
- Family Member
- Other

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

Business: \_\_\_\_\_

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

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

Phone: \_\_\_\_\_

Comments: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

*First Circuit CASA recognizes that this gift is subject to change depending on personal or economic circumstances. This form is not intended to be a legally binding pledge. The information you provide will remain confidential.*

**Questions? Please contact Jackie Horton, Executive Director**

**Phone: 605-996-1212**

**Email: [jackie.horton@mitchellcasa.org](mailto:jackie.horton@mitchellcasa.org)**