



Planned Giving Notice of Intent

Thank you for including CASA of San Mateo County in your estate plans. Your gift will secure CASA's long-term ability to support young people navigating the foster care and juvenile justice systems. We appreciate you informing us of your intention to give so that we can maintain accurate records and verify how you wish to be acknowledged. If you have any questions about your gift, please contact Spencer Lee at spencer@casaoofsanmateo.org.

Name: _____
Address: _____
Email: _____
Phone Number: _____

I/We have included CASA of San Mateo County in our estate planning in the form of:

- Will or Trust
- Retirement Plan or IRA
- Charitable Remainder Trust
- Other: _____

I/We would like to be recognized as: _____

- Please do not list my/our name (listed as anonymous)
-

Optional Information *(This information will be kept confidential and unlisted)*

I/We estimate the current value of this gift at \$ _____ or ____%.

Name of executor or trustee: _____

Phone number of executor/trustee: _____

Signature: _____

Date: _____

Signature: _____

Date: _____

Please return this form by mail to the address below or by email to Spencer Lee at spencer@casaoofsanmateo.org

CASA of San Mateo County c/o Spencer Lee
330 Twin Dolphin Drive, #139
Redwood City, CA 94065

This form is intended to notify CASA of San Mateo about your plans and is not legally binding. We encourage you to discuss your plans with an attorney and/or financial advisor. All information will be kept strictly confidential. CASA of San Mateo County is a 501(c)(3) tax exempt organization, federal tax ID: #04-3849393.