

THE AMERICAN FOUNDATION

4518 N. 32nd Street ♦ Phoenix, AZ 85018 ♦ Phone: 602-955-4770 ♦ Fax: 602-955-4707
 email: newcase@americanfoundation.org ♦ www.americanfoundation.org

New Case Information Form

The information requested in this form will be used to help determine the proper charitable estate planning tools to achieve the donor's objectives. After this confidential questionnaire is completed and returned to the American Foundation, the development staff will prepare and forward proposed illustrations to the professional advisor. Please allow up to 2 business days for a return illustration. **Fax completed form to: 602-955-4707 or email: newcase@americanfoundation.org.**

Financial Advisor Section

Financial Advisor Section		Today's Date	
Name		Title	
Phone		Fax	
Address		Company	
		Email	
City, State, Zip		Mobile	

Donor Section

Name		Spouse		
Home Phone		Business Phone		
Address		Email		
		Donor DOB		Age
City, State, Zip		Spouse DOB		Age

Approx. Net Worth		Approx. Income (AGI)	
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Family Members Involved In or Receiving Benefit from Estate Plan	Age or DOB	Family Members Involved In or Receiving Benefit from Estate Plan	Age or DOB

Asset Type (i.e. land, stock, business, property)*	Current Value	Cost Basis	Debt	% Yield or %Growth

*If asset is held by a corporation, please specify which kind (i.e. C Corp, S Corp, LLC, etc.). Use additional sheets if necessary.

Projected long term annual return of charitable trust or foundation (%)	
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For American Foundation use only. (Recommendations/Illustrations)
