Klarstig

# Financial Services Memorial Gift Donation

Record the gift you would like to make, its intended use and your acknowledgment preferences. This form records a pledge or donation instruction; it does not process a payment.

## Contact and reference

**Organization using this document**

**Your name or contact reference ***

**Email for a reply if needed**

## Information for this document

**Gift amount ***

**Currency ***

- ☐ USD
- ☐ EUR
- ☐ GBP
- ☐ CAD
- ☐ Other

**Other currency code if selected**

**Gift frequency ***

- ☐ One time
- ☐ Monthly
- ☐ Quarterly
- ☐ Annually

**Intended fund or purpose ***

**Recognition preference**

- ☐ Use my name
- ☐ Keep my name private
- ☐ Contact me first

### Acknowledgment recipient or instructions

### Gift instructions or restrictions

## Specific details

### Name of the person being remembered

Complete when relevant to this request.

### Family notification preference and message to include

## Operating context

### Service area and case reference

Complete when relevant to this request.

### Authorized reviewer supporting information and handling restrictions

## Limitations and what needs setup

- Submitting the form records the answers in your workspace. It does not approve, schedule, charge or reply on its own unless you add that step to the workflow.
- No payment is taken by default. Online payment needs a connected payment account and is configured separately.
- Some questions become required only after certain answers. The printable version shows every question.
- Email notifications, approval routing, document generation and connections to other systems are available but not switched on until you configure them.

**Want help tailoring this form? Free, Starter and Pro include five personal setup sessions, up to 30 minutes each, per new organization.**

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