Charitable Gift Annuity Illustration Request Form

To request a complimentary Charitable Gift Annuity Illustration from The Philadelphia Orchestra, please complete and return this request form. This illustration is for informational purposes only and does not constitute a contractual gift agreement between you and The Philadelphia Orchestra.

**Donor(s)** (Enter both names if property is jointly owned or community property; otherwise enter one name)

Name: ______________________________________  Name: ______________________________________
Date of birth: _________________________________  Date of birth: _________________________________
Address: ____________________________________  Address: ____________________________________
City: ___________ State: _______ Zip: _______  City: ___________ State: _______ Zip: _______
Phone Number:_______________________________  Phone Number:_______________________________
Email: _____________________________________  Email: _____________________________________

**Annuitant(s)**

Check one:

_____ One annuitant

_____ Two annuitants, joint-and survivorship (payments to both jointly, continuing to the survivor)

_____ Two successive annuitants (payments to one, then to the survivor)

If annuitant(s) is (are) other than the donor(s), complete the following:

First annuitant  Second Annuitant

Name: ______________________________________  Name: ______________________________________
Date of birth: _________________________________  Date of birth: _________________________________
Address: ____________________________________  Address: ____________________________________
City: ___________ State: _______ Zip: _______  City: ___________ State: _______ Zip: _______
Relationship to donor: __________________________  Relationship to donor: __________________________

**Contribution** (select all that apply)

Cash: anticipated dollar value $ __________________________

Securities

Other Property (describe)___________________________________________________________________
Annuity Type

1. Will payment of the annuity be immediate or deferred?  _____ Immediate payment  _____ Deferred payment

   If deferred, check and complete either (a) or (b) below:

   (a) Payments are to begin on this specific date: _________________

   (b) Payments may begin on _______________ in any year during the period ___________ and ___________

       (indicate mo/day) (1st possible yr) (last possible yr)

2. Payment frequency (check one):  ____ Quarterly  ____ Semiannually  ____ Annually

Send your completed form to:
Mitch Bassion
Assistant Vice President of Development
The Philadelphia Orchestra
One South Broad Street, 14th Floor
Philadelphia, PA 19107
Phone: 215.893.1811
Or email to mbassion@philorch.org

Illustrations will be completed and returned to you within five (5) business days. If you decide to establish a charitable gift annuity with the Orchestra, you will be asked to complete an application form. Once this form is completed and returned, a formal contract will be drafted for your review and signature.

Thank you for your interest in establishing a Charitable Gift Annuity with The Philadelphia Orchestra.