

# The Philadelphia Orchestra

Yannick Nézet-Séguin Music Director

## 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) (1<sup>st</sup> 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, 14<sup>th</sup> Floor  
Philadelphia, PA 19107  
Phone: 215.893.1811  
Or email to [mbassion@philorch.org](mailto: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.