

# The Philadelphia Orchestra—Confidential Planned Gift Intention Form

*Please complete and return this form if you have already made provisions for a gift in support of the Orchestra. If you have not made a gift but would like more information on giving options, please complete the opposite side and return.*

*Planned gift donors have the option to become named or anonymous members of the Wister Society, the Orchestra's recognition group for legacy donors. Benefits include program listing and an annual member recognition luncheon.*

I am willing to be listed as a Wister Society member       I prefer to remain anonymous for this gift

Please list name(s) as: \_\_\_\_\_

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

Type of Planned Gift: The following information is helpful to the Orchestra for planning purposes. Please check all that apply and estimate the value of each gift in today's dollars. If you have named the Orchestra as a percentage beneficiary, please indicate the dollar value of the Orchestra's percentage so that we can recognize you for your generosity.

Will: \$ \_\_\_\_\_       Insurance Policy: \$ \_\_\_\_\_

Revocable Living Trust: \$ \_\_\_\_\_       Real Estate (describe below): \$ \_\_\_\_\_

Charitable Remainder Trust: \$ \_\_\_\_\_       Other Asset (describe below): \$ \_\_\_\_\_

Retirement Plan/IRA: \$ \_\_\_\_\_

Is this gift to the Orchestra contingent on another beneficiary surviving you?  No  Yes

Additional Information: \_\_\_\_\_

\_\_\_\_\_

The Philadelphia Orchestra wishes to assure you that this statement of intention does not constitute a legal obligation and will not be legally binding in any way on you, your heirs or your estate. Further, the Orchestra understands that the size of your future gift may be significantly different from the amount estimated above.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**For more information** or if you have questions, please contact Mitch Bassion at 215-893-1811 or mbassion@philorch.org. Please return this completed form using the enclosed return envelope or to: The Philadelphia Orchestra, Development Office, One South Broad Street, 14th Fl., Philadelphia, PA, 19107.