

RICHMOND SYMPHONY

STATEMENT OF PLANNED GIFT INTENTION

Personal & Confidential

The Richmond Symphony recognizes those who have helped secure its future by making gifts through their will and other planned gift arrangements. The Symphony welcomes these friends as members of the Rennolds Society.

In support of the Richmond Symphony, I/we intend to provide a gift through my/our estate as detailed below. In order to properly record and acknowledge the gift, I am providing the following information about my/our estate plans.

**Required information; other information is requested but optional.*

Name(s)* _____

Birthdate(s) _____

Address* _____

City* _____ State* _____ Zip* _____

Phone* _____ E-mail* _____

Professional Advisor _____ Phone _____

TYPE OF GIFT

It is my/our intent to provide a legacy gift through my/our (check all that apply)*:

- | | |
|--|---|
| <input type="checkbox"/> Bequest | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Charitable Gift Annuity | <input type="checkbox"/> Life Insurance Policy |
| <input type="checkbox"/> Retirement Plan Assets | <input type="checkbox"/> Other _____ |

PURPOSE OF GIFT

Please direct my planned gift to*:

- | | |
|--|---|
| <input type="checkbox"/> Richmond Symphony
(Annual Fund) <i>Tax ID 54-6024033</i> | <input type="checkbox"/> Richmond Symphony Foundation
(Endowment) <i>Tax ID 54-1514987</i> |
|--|---|

If your gift is being directed to the Richmond Symphony Foundation, please indicate to which fund:

DESCRIPTION OF GIFT

Please describe the nature of your gift. (*i.e. percentage of estate, specific amount, property, etc.*)

Estimated present day value of gift \$ _____
Used for long-term planning and recognition purposes only, not a binding valuation.

DOCUMENTATION OF GIFT

- A copy of the provision is attached.
- A copy of the provision will be sent once executed.
(NOTE: A planned gift is not considered fully documented until a copy of the provision is received)
- I/We prefer to reveal my/our plans at a later date.

Please indicate how you would like to be recognized on the Rennolds Society list:

- I/We prefer to remain anonymous.
- I/We would like to be listed in the following way (please print):

Signature* _____ **Date*** _____

Signature* _____ **Date*** _____

Thank you for your support. If you have any questions or are interested in learning about opportunities to name a fund, please contact Trish Poupore (tpoupore@richmondsymphony.com or (804) 329-7005).

The Richmond Symphony and its Foundation are 501(c)(3) non-profit organizations. All gifts are tax deductible as provided by law.

*Richmond Symphony (Annual Fund) Tax ID 54-6024033
Richmond Symphony Foundation (Endowment) Tax ID 54-1514987*

