



**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)\*:

- Will Bequest/Revocable Trust Gift
- Charitable Gift Annuity
- Charitable Remainder Trust
- Charitable Lead Trust
- Beneficiary Designation:
  - Retirement Account
  - Annuity
  - Life Insurance Policy
- Other \_\_\_\_\_

**PURPOSE OF GIFT**

Please direct my planned gift to\*:

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

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.)

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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):

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**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](mailto:tpoupore@richmondsymphony.com) or (804) 788-4717, x115).

*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*