

Learn about Symphoncity's New Legacy Society

Print & Mail This Form to the Symphoncity Office

JOINING

Symphonicity Encore Society

Our LEGACY SOCIETY, *Symphonicity Encore Society* recognizes individuals and couples who have notified us that they have included Symphoncity in their Will or other deferred giving plan. Symphoncity is a 501(c)(3) non-profit organizations. All gifts are tax deductible as provided by law.

HERE'S HOW TO JOIN THE LEGACY SOCIETY – JUST TWO STEPS:

1. Arrange for your estate to leave a gift to Symphoncity. Common ways to do this are:
 - As a beneficiary of a bequest through our Will or Trust
 - As a beneficiary in an IRA, annuity, or 401K/403B Retirement Plan
 - As a beneficiary or owner of a Life Insurance Policy
 - As a beneficiary of a Charitable Gift Annuity, Charitable Remainder Trust, or other planned gift

Symphonicity's Federal Tax ID Number is
52 – 1270466

2. Inform Symphoncity that you have made the necessary arrangements by returning this form. This will give us permission to include your name in future listings of *Symphonicity Encore Society* members.

- I/We have made a provision for Symphoncity in my/our estate plans and wish to be included in the *Symphonicity Encore Society*.
- The current estimated amount is \$ _____, (not a binding valuation), in the form of _____, or
- We do not wish to include the amount.
- I/We agree that we may be publicly listed as members of the *Symphonicity Encore Society* in any Symphoncity program, advertisement or communication to potential donors and Symphoncity Legacy members. The amount will not be included in any listings.

Please print your name(s) as you wish to be listed.

- I/We have made a provision for a gift, but prefer not to be listed as members of the *Symphonicity Encore Society*.
- I/We have not yet planned for a future gift, but would like more information about how to leave a legacy through our Will or other planned giving arrangement.

Signature

Date

Address

Phone

Email

What is the Legacy Society?

1. The *Symphonicity Encore Society* recognizes individuals and couples who have named Symphoncity as the beneficiary of any type of planned or deferred gift. The purpose is to acknowledge and thank those who have made these gifts and to encourage and inspire others to do the same.
2. Members of the *Symphonicity Encore Society* will be recognized in our concert programs and on our web page. Also, you will be invited when we hold special receptions for the *Symphonicity Encore Society* members.
3. Joining the *Symphonicity Encore Society* requires two steps. First, arrange for a planned gift in favor of Symphoncity. Second, inform the Symphoncity Office by submitting this form, or by calling the office at 757.671.8611.
4. The current value of your legacy gift will be used for long-term planning and recognition purposes only. It is not a binding valuation. You are under no obligation to disclose the information. You are, however, encouraged to discuss your gifts with us to make sure we can comply with your wishes.
5. Your gift will be endowed and grants from it will be made in perpetuity. If you would like to let us know your plans for its distribution, we will file this information confidentially, and you are then assured that your plans will be followed exactly as you have outlined them to us. Your instructions to us can be changed at any time with a simple phone call to the office.
6. Finally...Thank you. We are so pleased, through the *Symphonicity Encore Society* to recognize the people who are planning for gifts today that will provide significant benefits to our community in the future.

SYMPHONICITY
DANIEL W. BOOTHE — MUSIC DIRECTOR & CONDUCTOR

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