



# SEATTLE SYMPHONY

LUDOVIC MORLOT, MUSIC DIRECTOR

## LEGACY GIFT NOTIFICATION FORM

Name \_\_\_\_\_ Birthdate \_\_\_\_\_

Name \_\_\_\_\_ Birthdate \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Telephone ( \_\_\_\_\_ ) \_\_\_\_\_ Email \_\_\_\_\_

**Legacy Gift Notification**

I/We have named the  Seattle Symphony Orchestra  Seattle Symphony Foundation

as a beneficiary of my/our:

- Will
- Living Trust
- Charitable Remainder Trust
- Life Insurance Policy
- Retirement Assets
- Other \_\_\_\_\_

My/Our planned gift is:

- Unrestricted to provide maximum flexibility for the Symphony to pursue its mission.
- Restricted for the following Symphony priority *(please consult with the Symphony if you are considering a restricted gift to ensure that the proposed restriction can be honored)*:

\_\_\_\_\_

My/Our gift's approximate dollar amount or percentage is *(optional, but helps the Symphony with future planning)*:

\_\_\_\_\_

Attached is a copy of the relevant portions of the legal documents relating to my/our future gift to the Seattle Symphony or a letter from my legal or financial advisor that describes the nature and purpose of the gift *(optional, but helps the Symphony with future planning)*.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

**Please remember to complete reverse side of this form**

# MUSICAL LEGACY SOCIETY

I am/We are pleased to accept membership in the Seattle Symphony's Musical Legacy Society, which honors those who have included the Symphony in their long term financial plans. I/We understand that membership is based upon information provided about my/our future gift to the Symphony.

- I/We prefer to be listed with other Musical Legacy Society members in Seattle Symphony publications. (Allowing your name to be listed can inspire others to provide for the Symphony with a future gift.)

Please list me/us as:

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- I/We prefer to be anonymous in publications, but wish to accept the other benefits of membership.

Thank you for sharing with the Seattle Symphony details regarding your long-term financial plans. Information disclosed will be kept strictly confidential. This is not a legally binding document but assists the Seattle Symphony in planning for the future.

## MUSICAL LEGACY SOCIETY BENEFITS:

- Invitation to annual Recital Luncheon or spring event
- Invitation to Open Rehearsals
- Recognition in *Encore* program
- Listing on the Musical Legacy Society Donor Wall

For more information, please contact Planned Giving Director Becky Kowals, at 206.215.4852 or [becky.kowals@seattlesymphony.org](mailto:becky.kowals@seattlesymphony.org).

### **PLEASE RETURN COMPLETED FORM TO:**

Seattle Symphony | P.O. Box 21906 | Seattle, WA 98111-3906 | Attention: Planned Giving Director

**Please remember to complete reverse side of this form**