



THE MUSICAL LEGACY SOCIETY

Private and Confidential Planned Gift Statement of Intent

The undersigned verifies an existing planned gift, naming the Milwaukee Symphony Orchestra, Inc. or the Milwaukee Symphony Orchestra Foundation Trust in the gift instrument. The undersigned represents that s/he/they has no present intention to revoke the gift prior to death and would do so only if unexpected circumstances arise.

The undersigned certifies that s/he/they will provide the Milwaukee Symphony Orchestra with a deferred gift to take effect upon the death of the undersigned or at another time indicated by the undersigned, in the approximate amount of \$ _____ or _____% of bequest..

Name (s) (As you wish to be listed in concert programs.) _____ I/We prefer to remain anonymous

Date of Birth _____

Social Security # _____

Address _____ City _____ State _____ Zip Code _____

Phone _____

Nature of gift: _____ (Examples: will, bequest, charitable trust, IRA, life insurance policy, annuity, qualified benefit plan, real estate, other real property, direction to private foundations, etc.)

Name and address of law office or financial institution managing your planned gift. _____

Please submit a signed legally binding documents from their attorney or financial planner indicating the parameters of the gift (ex: signature page from will). All other information can be redacted.

Purpose of the gift: _____ special initiatives such as commissioning, recording, and touring

Current Operations: _____ artistic excellence, _____ performance, _____ guest artists, _____ education, _____ special initiatives such as commissioning, recording, and touring

Wherever the need is greatest: _____

Thank you for helping to ensure music for our future and for future generations.

Dated: _____ Signature(s): _____