



Confirmation of Deferred Gift Commitment

In order to honor your support as a member of our planned giving society, The Laureate Society, value your future gift, and properly thank you and acknowledge your gift, please provide the following information. This is a confidential record.

I choose to invest in the future of classical music by supporting the New Jersey Symphony in my estate planning.

1) Therefore, I have made a provision, through (select all applicable):

- | | |
|---|---|
| <input type="checkbox"/> Bequest in my Will | <input type="checkbox"/> Real Estate |
| <input type="checkbox"/> Trust | <input type="checkbox"/> Life Insurance |
| <input type="checkbox"/> IRA or other Retirement Fund | <input type="checkbox"/> Gift Annuity |
| <input type="checkbox"/> Other _____ | |

2) Please select and complete one from the following section:

☐ Pursuant to my provision, a percentage of my estate shall be donated to the New Jersey Symphony. As of today's date, I estimate the value of this provision in my estate plan to be approximately \$_____

☐ Pursuant to my provision, an amount of \$_____ shall be donated to the New Jersey Symphony through my estate.

☐ Pursuant to my provision, I intend to donate certain items of real estate or personal property to the New Jersey Symphony through my estate. The following items have been discussed and approved by New Jersey Symphony:

As of today's date, I estimate these items to be worth approximately \$_____.

3) Please select and complete one from the following section:

☐ This donation through my estate may be used as needed to fulfill the mission and goals of the New Jersey Symphony, protecting the future of classical music and music education.

☐ The New Jersey Symphony will be directed to use this donation for a specific purpose. Please outline your intentions below and/or provide additional documentation to clarify your goals and desires.

4) Please select and complete one from the following section:

☐ I would like my name published among other donors, listed by name and gift amount (if appropriate), in NJ Symphony season program books, the NJ Symphony website, and other printed materials. Please list my name(s) as:

☐ I prefer to have this donation remain anonymous.

In addition to the completion of this form, we kindly ask that you provide the following support documentation, which will be held in confidence:

- For a Charitable Gift Annuity or Charitable Lead Trust, please provide a copy of the annuity or trust documentation.
- For a provision in your will or estate plans, please provide a letter of intention from your attorney and/or a copy of the relevant section(s) of your will, including the final signature page.

I am pleased to support the mission and goals of the New Jersey Symphony through this donation, made as part of my estate plans. I understand that this planned gift to the New Jersey Symphony is unrelated to any lifetime gifts that I may contribute in the future. I am not making a legal or binding commitment upon my estate by submitting this document. Further, the New Jersey Symphony should understand that the size of my future gift may be different from the amount estimated above for the purposes of current valuation. I will notify the NJ Symphony if and when changes are made that will affect this deferred gift. I attest that the above information is accurate to the best of my knowledge.

Name _____

Address _____

City _____ State _____ Zip _____

Phone _____ Email _____

Signature _____ Date _____

Date of Birth ____ / ____ / ____

If you are the legal guardian of or have power of attorney for the above individual, please complete the section below:

Name _____

Address _____

City _____ State _____ Zip _____

Signature _____ Date _____

Thank you for supporting the New Jersey Symphony with your legacy gift!

New Jersey Symphony
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