



## PLANNED/ESTATE GIFT: Declaration of Intent

**I /We are pleased to share my/our intent to provide for the future of New West Symphony with a legacy gift.**

Name (s): \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone/email: \_\_\_\_\_

Signature/s: \_\_\_\_\_ Date: \_\_\_\_\_

**I/We have named New West Symphony as a beneficiary of a charitable gift in the following estate provisions:**

- ☐ Will/Living Trust    ☐ Charitable Remainder Trust
- ☐ Retirement Plan    ☐ Life Insurance Policy    ☐ Cash Gift in the amount of \$ \_\_\_\_\_
- ☐ \* Other (please describe): \_\_\_\_\_

Approximate amount of gift: \$ \_\_\_\_\_ % of estate: \_\_\_\_\_

**I/We are directing our support to the following:**

- ☐ Greatest Need \_\_\_\_\_
- ☐ Other (please describe) \_\_\_\_\_

**I/We have included a copy of the portion of my/our estate document naming New West Symphony as a beneficiary:**

☐ Yes    ☐ No

☐ **I/We would like to be listed as member/s of New West Symphony Legacy Society. Please list me/us as:**

☐ **I/We do not want to be listed and wish to remain anonymous.**

*All information is confidential and does not create a binding obligation.*

**Please return to:** New West Symphony

2100 Thousand Oaks Blvd., Suite D, Thousand Oaks, CA 91362

**(805) 435 - 2775 / [pjones@newwestsymphony.org](mailto:pjones@newwestsymphony.org) / TAX ID #: 77-0406042**



Patricia Jones