



LETTER OF INTENT FOR ESTATE GIFT

I/we have made arrangements to provide for the future well-being of the Music Academy of the West through a provision in my/our estate plan. I/we understand that this future commitment can be revoked or modified by me/us at any time.

Name/s _____

(Please include your spouse's name if this is a joint gift)

Address _____

City, State, Zip _____

Phone _____ Email _____

Birthdate (optional) _____

I/we have made a provision to leave a legacy to the Music Academy (please check all that apply):

- I/we have included the Academy in my/our Will or Revocable Trust.
- I/we have established an income-producing gift plan for the benefit of the Academy (charitable gift annuity, charitable lead trust, charitable remainder trust, other).
- I/we have made other estate provisions naming the Academy as beneficiary (life insurance policy, retirement plan or IRA, other).

Please provide a copy of the relevant portion of the legal documents in which your gift is described, or you may provide a letter from your financial or legal advisor describing your future gift to the Academy. You may also briefly describe your planned gift for the benefit of the Academy:

Please share the name and contact information of a family member, trusted friend, advisor, or attorney who we may contact if you are unreachable in the future.

Full name: _____ Relationship to you: _____

Mailing Address: _____

Phone: _____ Email: _____

Is your legacy gift a fixed dollar amount or a percentage of your estate?

Fixed dollar amount \$ _____ Percentage of estate _____ %

If a percentage of your estate, please share the estimated value as of today: \$ _____

If you prefer to list an estimated range for your future gift, please check one of the following:

- Up to \$50,000 \$500,000 – \$1,000,000 \$5,000,000 +
- \$50,000 – \$100,000 \$1,000,000 – \$2,000,000
- \$100,000 – \$500,000 \$2,000,000 – \$5,000,000

Donor(s) Signature(s) _____ Date _____

All information is to be kept confidential. This Letter of Intent is not legally binding to the commitment stated above.



THE ENCORE SOCIETY

By leaving a gift in your estate plans to the Music Academy, you are preserving the beauty of classical music and inspiring the next generation of classically trained musicians. Your dedication and passion will allow others to fall in love with music and carry on your legacy and commitment to the Academy. When you confirm a future gift to the Academy, we welcome you as a member of the Encore Society.

Please enroll me/us in the Music Academy's Encore Society under the following conditions:

- My/our name(s) may be published among the Music Academy's list of Encore Society founding members (gift amounts will not be published).

Please share how you would like your name(s) to be listed: _____

- My/our name(s) may be listed internally to the Music Academy only (no outside publication).
- My/our name(s) may not be listed internally or externally (anonymous gift).

MEMBERSHIP BENEFITS

Benefits and Recognition

- Invitation to Encore Society Recognition Event
- Recognition Certificate and Pin
- Ticketing and seating priority at the Council level (\$2,500)
- Invitations to special events
- Listing in publications as an Encore Society member

For more information on legacy giving or to schedule a complimentary estate planning consultation, contact Jill Rode, CFRE, Senior Director of Philanthropy at 805-695-7911 or jrode@musicacademy.org.