



# 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 of the West  
(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 adviser describing your future gift to the Academy. You may also briefly describe your planned gift for the benefit of the Academy:

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I/we wish to inform the Academy, for long-term planning purposes only, that the current value of my/our future gift is \$ \_\_\_\_\_. *(If your gift is a percentage of your estate, please indicate approximate value).*

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

- |                                                  |                                                    |                                                    |
|--------------------------------------------------|----------------------------------------------------|----------------------------------------------------|
| <input type="checkbox"/> Up to \$50,000          | <input type="checkbox"/> \$50,000 – \$100,000      | <input type="checkbox"/> \$2,000,000 – \$5,000,000 |
| <input type="checkbox"/> \$500,000 – \$1,000,000 | <input type="checkbox"/> \$1,000,000 – \$2,000,000 |                                                    |
| <input type="checkbox"/> \$5,000,000 +           | <input type="checkbox"/> \$100,000 – \$500,000     |                                                    |

Donor(s) Signature(s) \_\_\_\_\_ Date \_\_\_\_\_



By leaving a gift in your estate plans to the Music Academy of the West, 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 of the West'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 Supper
- Recognition Certificate and Pin
- Ticketing and seating priority at the Council level (\$2,500)
- Invitations to events and donor receptions
- 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, Director of Legacy Giving at 805-695-7911 or [jrode@musicacademy.org](mailto:jrode@musicacademy.org).**