



GIFT PLANNING

DECLARATION OF FUTURE INTENT

Thank you for your intention to include the Wichita Falls Symphony Orchestra in your estate plan. In order to document your intention accurately, please complete this form with as much detail as you are willing to share. Any information about your gift will remain confidential and does not create a binding obligation.

Recognition of Your Gift

For recognition purposes, please list my/our name(s) as follows:

- Please do not include my/our name in any public listings of donors. _____
- I/We wish for my/our gift intention to be confidential and anonymous, publicly and in Symphony records.
- Gift Agreement/Letter** -- I/We have signed a Gift or Letter Agreement with the Wichita Falls Symphony for this gift and have made no changes to the designation or purpose.
- No Gift Agreement/Letter** - Briefly describe allocation, designation, and how your gift should be used. _____

Description and Value of Gift - Please indicate below (by checking applicable options), how your future gift intention will be fulfilled and provide the estimated value for the Wichita Falls Symphony.

<u>Description</u>	<u>Amount or Percentage</u>	<u>Estimated Amount of Gift to the Wichita Falls Symphony</u>
<input type="checkbox"/> Will or Trust with a sum of	_____	_____
<input type="checkbox"/> Charitable Remainder Trust in the amount of	_____	_____
<input type="checkbox"/> Remainder of Retirement Fund/IRA with a total current value of	_____	_____
<input type="checkbox"/> Life Insurance Policy with a policy value at maturity of	_____	_____
<input type="checkbox"/> Other Item or Asset in the amount of Please describe (for example, private collections, real estate, securities, etc.):	_____	_____
<hr/>		
<input type="checkbox"/> Beneficiary - If the Symphony is only a contingent beneficiary, please explain conditions.		
<hr/>		
<input type="checkbox"/> Documentation - Please provide us with copies of any documents (or the relevant pages) that include provisions for the Wichita Falls Symphony.		

Please Complete Reverse Side

Contact Information

Will or Trust: If your gift is included in a will or trust, please provide the following:

Executor(s) or Trustee(s)

Name and Address

Phone and/or Email

Beneficiary Designation - If your gift is directed by a beneficiary designation, please provide the following:

Administrator or Company

Name and Address

Phone and/or Email

Other Information, Contacts and Relationships You Want Us to Know (family, attorney, etc.)

Name and Address

Phone and/or Email

This Declaration of Intent enrolls you in the Legacy Circle. You will be contacted regarding your participation.

New Intention: This is a new bequest intention to the Wichita Falls Symphony.

Update to Intention - This is an update to a previously recorded bequest intention to the Symphony.

Signature

Date

Signature

Date

Print Name

Print Name

Street Address

Street Address

City, State, Zip

City, State, Zip

Email and Phone Number

Email and Phone Number

Please send this form (together with copies of any relevant documents) to the WFSO Administrative Office. Please contact us if you have any questions or concerns at the number below.

Wichita Falls Symphony Orchestra

1300 Lamar Street, Wichita Falls, TX 76301

Phone: 940-723-6202 email: wfsoed@wfsso.org