

**Utah Symphony | Utah Opera**

**Planned Gift Documentation Form**

Name (please print): \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Name of Spouse: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

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

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

I/we have included Utah Symphony | Utah Opera in my/our long term financial plans as described on the reverse side of this form.

☐ Please include my/our name in the Tanner & Crescendo Societies membership lists.

My/our name should be listed as:

\_\_\_\_\_

☐ I/we wish to remain anonymous.

\_\_\_\_\_

Signature

\_\_\_\_\_

Signature

\_\_\_\_\_

Date

The Tanner and Crescendo Societies honor those who have included Utah Symphony and/or Utah Opera in their long term plans. Members are offered a variety of benefits including invitations to special events. Tanner and Crescendo Society members are recognized in program books.

**Please remember to complete the second page of form**

***Thank you for providing USUO's Development department with details regarding your estate plans.  
The information disclosed in this questionnaire will be kept strictly confidential.***

**☐ I/we have included Utah Symphony | Utah Opera in my/our will or revocable trust:**

- ☐ A specific bequest of \$ \_\_\_\_\_
- ☐ A percentage bequest of \_\_\_\_\_ % Estimated value of USUO share: \$ \_\_\_\_\_
- ☐ A contingent bequest of \_\_\_\_\_ % Estimated value of USUO share: \$ \_\_\_\_\_
- Contingencies: \_\_\_\_\_
- ☐ Other (please describe): \_\_\_\_\_

**☐ I/we have named Utah Symphony | Utah Opera as a beneficiary of an irrevocable trust or life-income arrangement**

- ☐ Charitable Remainder Trust USUO interest: \_\_\_\_\_ % Estimated value: \$ \_\_\_\_\_  
Date Established: \_\_\_\_\_ Original value: \$ \_\_\_\_\_ Current value: \_\_\_\_\_
- ☐ Charitable Lead Trust USUO interest: \_\_\_\_\_ % Estimated value: \$ \_\_\_\_\_  
Number of years: \_\_\_\_\_
- ☐ Other (please describe): \_\_\_\_\_

**☐ I/we have made Utah Symphony | Utah Opera the beneficiary of:**

- ☐ A life insurance policy Face value: \$ \_\_\_\_\_ Cash value: \$ \_\_\_\_\_
- ☐ A qualified retirement plan USUO interest: \_\_\_\_\_ % Estimated value: \$ \_\_\_\_\_  
Primary or Secondary Beneficiary (please circle one)
- ☐ Other: \_\_\_\_\_

**Designation of my/our planned gift:**

- ☐ Unrestricted for USUO operating support, or where most needed
- ☐ Endowment
- ☐ Other details or restrictions, if any (please describe):  
\_\_\_\_\_

**☐ I/we have attached a copy of the portion of my/our planning document that pertains to USUO.**