

# PLANNED GIFT DOCUMENTATION FORM

We are deeply grateful you have included Utah Symphony | Utah Opera in your estate plans. Your generosity and legacy of support will ensure our Utah community is connected to great live music for generations to come - thank you! Please complete the following information to help us prepare for the future.

## PART 1

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

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

Phone: \_\_\_\_\_ 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.

\_\_\_\_\_  
Signature Date

\_\_\_\_\_  
Signature Date

## TANNER & CRESCENDO SOCIETIES ■■■■■■■■■■

The Tanner & Crescendo Societies honor those who have included Utah Symphony | Utah Opera in their long-term plans. Members are offered a variety of benefits including recognition in all USUO playbills, invitations to special events, opportunities for meet and greets with artists, and more. There is no minimum gift amount.

Please include my/our name in the Tanner & Crescendo Societies membership lists.  I/we wish to remain anonymous.

My/our name should be listed as: \_\_\_\_\_

Please complete Part 2 on the reverse side. Upon completion, kindly submit this form to Leslie Peterson (VP of Development) at [lpeterson@usuo.org](mailto:lpeterson@usuo.org) or by mailing to her attention at Utah Symphony | Utah Opera with the address below.

## PART 2

Thank you for providing USUO with details regarding your estate plans. The information disclosed in this form will be kept strictly confidential.

### WILL OR REVOCABLE TRUST ■■■■■■■■■■

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): \_\_\_\_\_

### IRREVOCABLE TRUST OR LIFE-INCOME ARRANGEMENT ■■■■■■■■■■

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 ■■■■■■■■■■

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

- A life insurance policy      Face Value: \$ \_\_\_\_\_ Cash value: \$ \_\_\_\_\_
  - A qualified reirement plan      USUO interest: \_\_\_\_\_ % Estimated value: \$ \_\_\_\_\_
- Please select one:     Primary beneficiary     Secondary beneficiary
- Other (please describe): \_\_\_\_\_

### DESIGNATION OF PLANNED GIFT ■■■■■■■■■■

My/our gift should be designated towards:

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

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