



Thank you for taking this first vital step in joining Santa Rosa Symphony's distinguished **Heritage Society** by adding our organization to your estate plan. At this preliminary stage in the process, we request that you provide some general information below, all of which will be kept in the strictest confidence.

**CONFIDENTIAL**  
**Future Gift Intent**

Donor name(s) as you wish to be recognized: \_\_\_\_\_ Date(s) of birth: \_\_\_\_\_  
\_\_\_\_\_

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

It is my/our intent to leave a legacy to Santa Rosa Symphony through my/our:

Will     Retirement Plan Assets     Life Insurance     Living Trust  
 Charitable Remainder Trust     Family Foundations     Other: \_\_\_\_\_

I/we wish to inform the Symphony, for long-term planning purposes only, that as of this date, the dollar value of my/our projected gift is: \$ \_\_\_\_\_.

*\* If your gift is a percentage of your estate, please indicate the approximate current dollar value of that percentage.*

You may publish my/our name(s)     Do not publish my/our name(s)  
 I/we understand that the projected value of our gift intention will not be published

I/we understand that, by stating an amount, my/our estate is not legally bound by this statement, and I/we may add to, subtract from, or revoke this gift at any time, at my/our sole discretion.

*\* The Symphony will appreciate notification any time you make changes or adjustments to your gift intention.*

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

Name & contact information of Executor: \_\_\_\_\_  
*(if available)*

Santa Rosa Symphony, Federal tax-exempt ID #94-6134075, is a charitable organization as defined in Section 501(c)(3) of the Internal Revenue Code.

Please contact our office if you have any questions or concerns. Future generations of musicians, composers and audiences will be grateful knowing that a passionate supporter of the arts made it possible for them to participate in the profound human experience that only music can offer.

Please retain a copy of the completed letter for your records and return the original to:

**Santa Rosa Symphony**  
**Heritage Society**  
**50 Santa Rosa Avenue, Suite 410**  
**Santa Rosa, CA 95404**

For questions email [erickley@srsymphony.org](mailto:erickley@srsymphony.org)  
or call (707) 546-7097 ext. 214