



Legacy Gift Intent Form

The Peoria Symphony Foundation is a non-profit private foundation established to maintain and manage an endowment fund to provide long-term financial support to the Peoria Symphony Orchestra well into the future.

Supporting the Peoria Symphony Foundation endowment with gift through your Will or estate plan is a promise to future generations that the Peoria Symphony Orchestra will be there to entertain, educate, and inspire through music. Whether a legacy gift for the future, a gift today, or a blend of both, the Peoria Symphony Foundation is honored and grateful that you have chosen to share your legacy with a gift to build the Peoria Symphony Foundation endowment. It is a gift that will go on in perpetuity to support the mission of the Peoria Symphony Orchestra.

Thank you!

Donor information:

Name: _____ Date of Birth: __/__/__

Name: _____ Date of Birth: __/__/__
(If applicable)

Mailing Address: _____

Home Phone: _____ Cell Phone: _____

Email: _____

My legacy gift to the Peoria Symphony Foundation will be:

☐ Bequest in my Will ☐ Beneficiary of Life Insurance ☐ Other _____

☐ Beneficiary of a Trust ☐ Beneficiary of Retirement Assets

☐ Peoria Symphony Foundation has been named as a contingent beneficiary in my Will

☐ I would like to talk with someone about making a blended gift (a gift now and in the future)

☐ My gift is in honor/memory of: _____

☐ My gift will be a specific amount \$ _____

☐ My gift will be a percentage amount _____ %

☐ I prefer not to disclose my gift amount

☐ I would like more information about the *Harold Plowe Society*.

Signature: _____ Date: _____

Please print clearly

Signature: _____ Date: _____

(If applicable)

Please print clearly

Sample Bequest Language

Thank you for considering the Peoria Symphony Foundation in your estate plans.
For your convenience, here is some suggested language for you to include in your estate document.

BEQUEST OF CASH

"I hereby give, devise and bequeath \$_____ to the Peoria Symphony Foundation, a non-profit private foundation, located at 101 State St., Peoria, IL 61602, Federal Tax ID #37-1137073, for the Peoria Symphony Foundation endowment's general use & purpose in support of the Peoria Symphony Orchestra."

BEQUEST OF A PERCENT OF THE ESTATE

"I hereby give, devise and bequeath ____ percent (___%) of my total estate, determined as of the date of my death, to the Peoria Symphony Foundation, a non-profit private foundation located at 101 State St., Peoria, IL 61602, Federal Tax ID #37-1137073, for the Peoria Symphony Foundation endowment's general use & purpose in support of the Peoria Symphony Orchestra."



We invite you to consider fulfilling your philanthropic goals for the Peoria Symphony Foundation with gifts that provide you with additional tax advantages, such as:

- Gifts of appreciated stock
- Beneficiary gifts
- Gifts of Grain

Also, naming the Peoria Symphony Foundation as a beneficiary on assets like a life insurance policy or IRA is an easy way to create a legacy gift without the need to change your Will.

Please contact Anthony Marotta, Executive Director for more information.

Office: (309) 671-1096 or anthony@peoriasymphony.org

The Peoria Symphony Foundation is pleased to share this information however does not provide tax or legal advice. We recommend you contact your legal/financial advisor for specific questions regarding your Will or estate plans. If for any reason the Peoria Symphony Foundation is unable to fulfill the designation of your legacy gift, the Peoria Symphony Foundation Board of Directors will determine a use for your gift that most closely matches your original intent. The Peoria Symphony Foundation (FEIN: #37-1137073) is a tax-exempt private foundation under section 501(C)3 of the Internal Revenue code.

Please return to:

Peoria Symphony Orchestra Foundation

ATTN: Anthony Marotta

101 State Street

Peoria, IL 61602

www.PeoriaSymphonyFoundation.org



*Thank you for choosing to share the gift of music with
future generations!*