



LEGACY GIFT NOTIFICATION FORM

Name: _____

Address: _____

Phone: _____

For help filling out this form, please contact us at 206.389.7669 or planned.giving@seattleopera.org

GIFT INFORMATION

1. I have included the Endowment for Seattle Opera (held by the Seattle Opera Foundation):

- A. in my will or trust.
- B. as a beneficiary of my life insurance policy.
- C. as a beneficiary of my retirement account.
- D. other (please specify) _____.

Pursuant to your letter, the testamentary documentation you have on file is correct and there is nothing more I have to share at this time.

2. My legacy gift is for:

The Endowment for Seattle Opera

A. General Endowment*

- 1. Unrestricted as to Purpose, or
- 2. Purpose Restricted for: _____

**Please note, "Unrestricted" gifts to the Endowment for Seattle Opera will be added to the General Endowment unless specifically designated for a purpose restriction.*

The approximate value of my gift is currently \$_____. (optional)

B. Set up a new Named Endowed Fund (available for gifts of \$100,000 or more) to be used for:

- 1. General Endowment (unrestricted as to purpose), or
- 2. Purpose Restricted for: _____

NAME OF YOUR **NEW** ENDOWED FUND _____

The approximate value of my gift is currently \$_____. (optional)

Seattle Opera (for current use or as determined by the Board of Directors)

- A. Unrestricted as to Purpose, or
- B. Purpose Restricted for: _____

The approximate value of my gift is currently \$_____. (optional)

(over, please)

GIFT DOCUMENTATION

4. I have attached a copy of the relevant portion of my will, trust, beneficiary designation form or other planned giving document (title page, page enumerating the gift to Seattle Opera or the Endowment for Seattle Opera, your signature. Please blackout other confidential information).
- I would rather speak to a Seattle Opera representative about this option. Please contact me.

5. Gift Recognition – After notification is received

The Encore Society

The Encore Society is our way of honoring those very special donors who have made a commitment to the longevity and vitality of opera by including us in their estate plans. Donors that direct their gifts - wills, trusts or other planned gifts - to Seattle Opera for outright support or to the Endowment for Seattle Opera for permanent investment are recognized throughout the season.

Benefits include an invitation for two to the annual Encore Society luncheon, name recognition in select Seattle Opera program books, invitation to Seattle Opera's annual meeting, individualized estate planning assistance, and more!

My name to appear in Seattle Opera publications as: _____, as previously indicated on my Encore Society membership form

Please update my Encore Society Listing as follows:

_____.

OR:

I wish to remain anonymous, but I'd like to receive invitations and notifications from the Encore Society.

If you are not interested in receiving Encore Society mailings or invitations to events, please check

DONOR SIGNATURE

Signature: _____ Date: _____

Signature: _____ Date: _____

Seattle Opera and the Seattle Opera Foundation thank you for your legacy support.

For more information or a personalized proposal, please contact us at:
206.389.7669 or planned.giving@seattleopera.org