



Planned Giving Intention Form

I/We have taken steps to make a bequest or other planned gift to the DSO EIN # 36-6108011.

Name: _____ Date of Birth: _____

Spouse Name: _____ Date of Birth: _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

It is my/our intent to leave a legacy to the DuPage Symphony Orchestra through my/our:

- | | |
|--|--|
| <input type="checkbox"/> Bequest from my will/trust | <input type="checkbox"/> Life Insurance Beneficiary |
| <input type="checkbox"/> Retirement plan beneficiary | <input type="checkbox"/> Charitable Remainder Trust distribution |
| <input type="checkbox"/> Family foundation beneficiary | <input type="checkbox"/> Other: _____ |

As of this date, the estimated value of my/our gift is: \$_____. *(If your gift is a percentage of estate, please indicate the present value of that percentage).*

The Gift will be directed toward the Annual Fund or Board Reserve Fund and will be used at the discretion of the Board of Directors to help fulfill the DSO mission of providing inspiration and cultural enrichment through musical excellence, educational programs, and community outreach unless other specified.

Requested area of support: _____

Restricted donations must be discussed and documented in advance and are subject to approval by the Board of Directors.

The DuPage Symphony Orchestra may list my/our name in its Legacy Society as follows:

- ☐ _____
- ☐ I wish to remain anonymous.

Signature: _____ Date: _____

Spouse Signature: _____ Date: _____

A copy of your will with specific intentions regarding this gift is welcome, but not required. To make certain your specific intentions are carried out, wills, and other vehicles should be prepared by or with the advice of your attorney.

This document is non-binding and does not constitute a legal promise of any future donation to the DuPage Symphony Orchestra.

Once received, the funds will be managed by the DSO in accordance with the DSO's gift acceptance policies and procedures until fully utilized.

Thank you for including the DuPage Symphony Orchestra in your estate plan.

Please return completed form to:
DuPage Symphony Orchestra
PO Box 844, Naperville, IL 60566