



DAVID ROBERTSON | MUSIC DIRECTOR

LEGACY GIFT INTENT FORM

Name _____ Birthdate _____

Name _____ Birthdate _____

Address _____

City _____ State _____ Zip Code _____

Telephone _____ Email _____

Legacy Gift Notification

I/We have named the **Saint Louis Symphony Orchestra** (*legal title*) as a beneficiary of my/our:

- Will
- Living Trust
- Charitable Remainder Trust
- Life Insurance Policy
- Retirement Assets
- Other _____

My/Our planned gift is:

- Unrestricted to provide maximum flexibility for the St. Louis Symphony Orchestra to pursue its mission.
- Restricted for the following priority (*please consult with the SLSO if are considering a restricted gift to ensure that the proposed restriction can be honored*):

My/Our gift's approximate dollar amount or percentage is (*optional, but helps the SLSO with future planning*):

- Attached is a copy of the relevant portions of the legal documents relating to my/our future gift to the SLSO or a letter from my legal or financial advisor that describes the nature and purpose of the gift (*optional, but helps the SLSO with future planning*).

Signature _____ Date _____

Signature _____ Date _____

LEGACY CIRCLE

I am/We are pleased to accept membership in the St. Louis Symphony Orchestra's Legacy Circle, which honors those who have included the orchestra in their long term financial plans. I/We understand that membership is based upon information provided about my/our future gift to the SLSO.

- I/We prefer to be listed with other Legacy Circle members in *Playbill* and on the Wall of Honor at Powell Hall. (Allowing your name to be listed can inspire others to provide for the SLSO with a future gift.)

Please list me/us as:

- I/We prefer to be anonymous in publications, but wish to accept the other benefits of membership.

Thank you for sharing details regarding your long-term financial plans. Information disclosed will be kept strictly confidential. This is not a legally binding document but assists the SLSO in planning for the future.

Legacy Circle Recognition:

- Recognition in *Playbill*, on the Wall of Honor and in the Whitaker Room
- Admission to the Whitaker Room before classical concerts and during intermission (complimentary refreshments, coffee and tea, cash bar, coat rack and restrooms)
- Invitations to special events and opportunities to meet SLSO musicians, as well as other Legacy Circle members

For more information, please contact Elaine Wichmer at 314-286-4457 or legacy@slo.org.

PLEASE RETURN COMPLETED FORM TO:

St. Louis Symphony Orchestra
Attn: Elaine Wichmer
718 North Grand Blvd.
St. Louis, MO 63103