

OPERA IDAHO
BEL CANTO LEGACY SOCIETY
STATEMENT OF PLANNED GIFT INTENTION
(please print or type all information)

Name(s): _____

Address: _____

Phone: _____ Email: _____

Date of Birth: _____ Date of Birth: _____
Donor #1 *Donor #2*

Relationship to Opera Idaho (check all that apply):

- Season ticket subscriber
- Occasional performance attendee
- Annual donor or sponsor
- E-news subscriber
- Other (please specify) _____

Statement of Provision

I/We have established a legacy gift for Opera Idaho, Inc. in my/our estate plans to be used as follows:

- Unrestricted
- Annual program support
- Specific program support. Program: _____
- Endowment
- Greatest need as determined by the board of directors

Type of Planned Gift **Estimated Value of Planned Gift Today**

I. Outright bequest in my will/living trust:

- Specific dollar amount \$ _____
- Percentage of estate % _____
- Specific property/asset _____
- Contingency beneficiary _____ After spouse/partner _____ After children/others

II. Trust arrangement with Opera Idaho, Inc. as a:

Beneficiary or remainder interest % _____ or \$ _____

Briefly describe type of trust and terms:

III. Life Insurance Policy

Whole life

Term

Policy provider: _____ % _____ or \$ _____

IV. Other, such as a retirement plan (IRA, 401(k), etc.)

Please specify : _____ % _____ or \$ _____

Plan provider: _____

For record-keeping purposes, although not required, we would appreciate **a copy of the section of your will, trust, beneficiary designation form or other document**, which substantiates the provision(s) listed above. Completion of this form does not obligate you to retain your planned gift. We will keep the information in a confidential file. In the event your estimated provisions change, we would appreciate you notifying us of such a change. *Any action that affects your overall estate plans should be discussed with your professional advisors.*

We will list you as a member/or members of **The Bel Canto Legacy Society** unless you wish to remain anonymous. Check here if you wish to remain anonymous .

Date

Signature
Donor #1

Signature
Donor #2