

# New World Symphony Planned Giving

The Legacy Society recognizes those thoughtful supporters who have included the New World Symphony in their estate plans. An estate gift is much more than a financial decision. It is a personal statement about who you are, what you care about, and what your legacy will be. NWS is deeply grateful to all those who have made a bequest, helping ensure the future of our unique programs.

\_\_\_\_\_  
First Name

\_\_\_\_\_  
Last Name

\_\_\_\_\_  
Email

\_\_\_\_\_  
Phone

## May we list you as a Legacy Society member in our publications (newsletter, playbill and website)?

Yes, I/we would like to be listed with the hope that we may inspire others to give.

I/we wish to remain anonymous.

## Please indicate your planned gift below:

Bequest  Life Insurance Policy  Retirement Plan / IRA  Stocks/Investment Portfolio  Trust

Irrevocable Trust or Agreement Other: \_\_\_\_\_

## The gift will be:

A specific amount (\$). \_\_\_\_\_

A gift of a specific asset. \_\_\_\_\_

A percentage of the residuary of my estate, trust or retirement plan. \_\_\_\_\_

I/we are attaching a copy of the page or paragraph from the will or trust bequest, beneficiary designation form for life insurance, charitable trust, beneficiary designation form for retirement plan, or other gift plan that describes my/our gift provision.

## Purpose of the gift to the New World Symphony:

Unrestricted to provide maximum flexibility for NWS to use for the greatest need. \_\_\_\_\_

For a specific purpose. \_\_\_\_\_

\_\_\_\_\_  
Signature\*



**Please return this form to Paul S. Woehrle, Vice President for Planned and Capital Gifts, New World Symphony, 500 17th Street, Miami Beach, FL 33139 (Paul.Woehrle@nws.edu)**

All information provided will be kept in the strictest confidence and will be used for internal planning purposes only. Completion of this form is not intended to be legally binding. Please discuss your planned giving intentions with your financial advisors and your family.

New World Symphony is a 501(c)3 organization (Federal Tax ID 59-2809056) registered with the Florida Department of Agriculture and Consumer Services (Registration #CH503). A copy of the official registration and financial information may be obtained from the division by calling toll free (800-435-7352). Registration does not imply endorsement approval or recommendation by the state.