



Planned Gift Commitment Form Dated: _____

I/We are pleased to inform the Santa Barbara Symphony (SBS) that I/we have included a future gift to benefit The Symphony in our estate plans, to leave a legacy of exceptional symphonic performances and vital youth education for our community.

I/We have named the Santa Barbara Symphony as a charitable beneficiary in our:

- ☐ Will/Living Trust ☐ Retirement Account ☐ Life Insurance Policy
☐ Charitable Remainder Trust ☐ Other: _____

Percent of Estate: % _____ Estimated Value: \$ _____

All information provided is confidential and does not create a binding obligation.

Donor Name(s): _____

Trust Name(s): _____

Address: _____

City/State/Zip: _____

Cell Phone: _____ Home Phone: _____

Email: _____

Date(s) of Birth: _____

In the listing of Heritage Society members, I/we would like to be recognized as follows:

Name(s): _____

☐ I/We prefer to remain anonymous ☐ I/We prefer to keep our gift amount unlisted

☐ Yes, I am [We are] willing to be interviewed for a profile as a member of the Heritage Society

Donor Distribution Directive: _____

Signature

Date

Signature

Date

Please keep a copy of this form for your files and return the original to:

Santa Barbara Symphony; Federal Tax # 95-2104089
1330 State Street, Suite 102, Santa Barbara, CA 93101
For more information, please call (805) 898-8785