

LEGACY CIRCLE

GIFT INTENTION FORM

Although it is not required for you to inform us of your intention to support Playhouse Square through a legacy gift, we appreciate the information and the opportunity to acknowledge your generosity. All information you provide will remain confidential. Any public recognition of your intent will only occur with your approval on this form.

Donor Information

Name(s)

Address

City, State, Zip

Phone _____ Email _____

We recognize our Legacy Circle members in annual, monthly and online publications. Please indicate how you would like to be recognized.

- Recognize me/us as: _____
- I/We wish to remain anonymous.

Gift Designation

Unrestricted

I/We request that this gift be used in the areas of greatest need for the organization.

Restricted

I/We request that this gift be restricted as indicated below.

- Educational Programming
- Capital Improvements
- Endowment

Planned Gift Information

Playhouse Square is named as a beneficiary of one of more of the options below. If you are willing to share specific details, please include that information in the space provided.

Will or Trust

- Estimated Dollar Amount \$ _____
- Share of Estate: _____% Estimated \$ _____
- Specific Property *(please describe)*: _____
_____ Estimated \$ _____
- Trust funded by will: *(name)* _____ Estimated \$ _____

Lifetime Funded Gift

- Charitable Remainder Trust: Estimated \$ _____
- Charitable Gift Annuity: Estimated \$ _____

Beneficiary of a Life Insurance Policy

Estimated \$ _____

Beneficiary of an IRA

Estimated \$ _____

Beneficiary of another financial/charitable account

Please describe: _____
Estimated \$ _____

This gift is: _____ Revocable _____ Irrevocable

PLEASE NOTE: Some financial firms may not contact beneficiaries after the account owner is deceased. If Playhouse Square is a beneficiary of an account not covered in your will, you must let us know. This will help us to claim the assets at the appropriate time. It is also recommended that you inform the executor of your estate and keep thorough documentation in your records.

Additional notes regarding my/our gift to Playhouse Square:

Signature(s): _____ **Date:** _____

This form is non-binding.

For more information or questions, contact Leanne Dewyer, Director of Development.

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Mail or email form:

Leanne Dewyer

Playhouse Square

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