

DONOR CONTACT INFORMATION

Name(s): _____

Address: _____

Phone: _____ Email: _____

I am willing to complete this form with the help of a Seattle Opera staff or Board Member.
Please contact me via _____.

GIFT INFORMATION – PLEASE SELECT ONE

1. I have included Seattle Opera or the Seattle Opera Foundation/Endowment for Seattle Opera:

- a. in my will or trust.
- b. as a beneficiary of my life insurance policy.
- c. as a beneficiary of my retirement account.
- d. other (please specify) _____.

2. My gift is for:

- a. The Endowment for Seattle Opera (Held by the Seattle Opera Foundation)
 - i. Permanent Endowment (General Fund)*
 - 1. Unrestricted as to Purpose, or
 - 2. Purpose Restricted for: _____

**Please note, "Unrestricted" gifts to the Seattle Opera Foundation will be added to the Permanent Endowment General Fund unless specifically designated "non-endowment" or "for current use."
If you plan to make such a **non-endowment** gift to the Foundation, please check here:*

- b. Set up a new Named Endowed Fund (available for gifts of \$100,000 or more) to be used for:
 - i. Permanent Endowment, or
 - ii. Endowment for Specified Years: _____ yrs
 - iii. Unrestricted as to Purpose, or
 - iv. Purpose Restricted for: _____

3. My gift is for:

- a. Seattle Opera (Non-Endowment -- For Current Use or As Determined by the Board of Directors)
 - i. Unrestricted as to Purpose, or
 - ii. Purpose Restricted for: _____

GIFT DOCUMENTATION

4. I have attached a copy of the relevant portion of my will, trust, beneficiary designation form or other planned giving document (title page, page enumerating the gift to Seattle Opera or Seattle Opera Foundation, your signature. Please blackout other confidential information).

I would rather speak to a Seattle Opera representative about this option. Please contact me.

5. Amount of Gift

The approximate value of my legacy gift is currently \$_____.

6. Gift Recognition – After the Gift is Received

I would like my name to appear in Seattle Opera publications as: _____.

I wish to remain anonymous.

7. The Encore Society

The Encore Society is our way of honoring very special donors who have made gifts through bequests, trusts or other planned gifts to Seattle Opera or Seattle Opera Foundation.

Benefits include an invitation for two to the annual Encore Society luncheon, special recognition in Seattle Opera's performance programs, invitation to Seattle Opera's annual meeting, individualized estate planning assistance, and more!

I am already in The Encore Society.

I wish to be included in The Encore Society.

I wish to be included in The Encore Society, but I am not interested in attending events.

DONOR SIGNATURE

Signature: _____ Date: _____

Signature: _____ Date: _____

Seattle Opera and Seattle Opera Foundation thank you for your legacy support.

For more information or a personalized proposal, please contact:

Planned Giving Officer Janell Johnson

206.676.5534 or Janell.Johnson@seattleopera.org