

OJAI MUSIC FESTIVAL

PLANNED GIVING STATEMENT OF INTENT

DONOR INFORMATION

Name _____

Address _____

City _____

State _____

Zip _____

Email _____

Phone _____

Signature _____

Date _____

GIVING INFORMATION

I/we have made the following provision(s):

- Bequest to the Ojai Music Festival in the amount of \$ _____, or _____ % of the estate which is currently valued at \$ _____ (optional information)
- Named the Ojai Music Festival as a beneficiary of:
 - Retirement plan
 - Life insurance policy
 - Financial or investment account
 - Charitable remainder trust
 - Charitable lead trust
 - Other _____

For our confidential records and so that we can most effectively honor your giving intentions, we hope that you will provide us with a copy of your entire (or appropriate portion) will, trust, estate planning or beneficiary designation forms, and estimated gift value. This disclosure form does not constitute a legally binding agreement.

IN RECOGNITION

In recognition of your generosity, the Festival is pleased to welcome you to the **Encore Society**, which is our legacy society of planned giving donors. Please indicate your preferred recognition listing name here:

Please submit this form and any supplemental documents in the enclosed envelope.

Thank you for your generous support!