



Encore Society Legacy Form

To formalize your bequest or other estate gift to benefit Marin Symphony, we simply need written documentation of your intention. It is useful, but not mandatory, to share a copy of the relevant section(s) of your will. Please feel free to include only the information that you are comfortable sharing. Your information will be kept strictly confidential and we will recognize your legacy gift only with your approval.

DONOR INFORMATION

Name(s): _____

Address: _____

City: _____ State: _____ Zip: _____

Birthday (Mo/Yr): _____ Spouse Birthday: _____

Telephone: _____

Email: _____

TRUSTEE OR EXECUTOR INFORMATION

Name(s): _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____

Email: _____

MARIN SYMPHONY ENCORE SOCIETY INFORMATION

Marin Symphony Association is pleased to recognize you as a member of the Encore Society in our published materials (eg, website, program book, eblast). Please indicate your recognition preference by checking one of the following:

☐ Please list my/our name(s) as: _____

☐ I/We wish to be anonymous.

One of the most effective ways of raising awareness about the importance of legacy gifts for Marin Symphony is to periodically profile our Encore Society donors, sharing with others the story of why they support us.

☐ I/we would be honored to be profiled in a future Marin Symphony publication. Please contact me/us.

BEQUEST INFORMATION

Marin Symphony is named as a beneficiary of (check all boxes that apply):
(Optional: please include the current estimated value of the asset.)

- ☐ Sections of my will or trust _____
- ☐ Retirement Account/Plan* _____
- ☐ Life Insurance Policy _____
- ☐ Investment or Financial Account* _____
- ☐ Other asset* _____

**NOTE: Please note that many firms do not contact beneficiaries when the account holder is deceased. Therefore, if you designate Marin Symphony as a beneficiary of any account not covered by your will, you must notify us of the designation to facilitate claiming of assets.*

DESIGNATION

- ☐ I request that funds be used to support Marin Symphony where they are needed most.
- ☐ Additional information or directions regarding my bequest:

Signature*: _____ **Date:** _____

Signature*: _____ **Date:** _____

**This form is non-binding.*

Thank you again for your continued support of Marin Symphony and for sharing your plans with us. We do track (anonymously) the total number of intended estate gifts and this information helps us attract additional donors. By notifying Marin Symphony about your gift, you help to leverage even more support.

Please return this form to:

Nuri Kye
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Marin Symphony Association
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San Rafael, CA 94903

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