



Legacy Circle

Planned Gift Confirmation Form

You can play an important role in your Orchestra's future while establishing a lasting personal legacy by making a planned gift to the Niagara Symphony Orchestra or the Niagara Symphony Legacy Endowment Fund.

Name(s): _____

Address: _____

City: _____ Province: _____ Postal Code: _____

Home phone: _____ Email: _____

I have included the Niagara Symphony Association as a beneficiary in my estate plans as follows:

- Bequest (Will)
- Gift of stock or other assets
- Life insurance policy
- Retirement plan (RRSP/ RRIF)
- Charitable gift annuity
- Other: _____

To be received as:

- A **Heritage Gift** to the **Niagara Symphony Legacy Endowment Fund**
Heritage Gifts are invested for the long-term benefit of the NSO and are used to generate annual interest grants to the NSO.
- A **Commemorative Gift** to the **Niagara Symphony Orchestra**
Commemorative Gifts are directed to annual operations to be used immediately for concert and education programs.

Optional & Confidential information:

- Estimated value range \$ _____
- I have included a copy of the section of my estate plan pertaining to my charitable gift.

NSO Legacy Circle Recognition:

- I would like my name to be acknowledged in the concert programs as _____
(e.g. John & Mary Smith)
- I would like to leave my gift in honour of _____
- I would prefer to remain anonymous
- Please send future correspondence to my email at _____

Signature: _____ Date: _____