

Planned Giving Intention Letter

I/We have made a provision in my/our estate plans for a deferred gift in support of the programs of the Chicago Symphony Orchestra Association and am/are pleased to share the details of the gift below and be considered a member of the Theodore Thomas Society.

Please note: This form is not binding, and all personal information listed will be kept in strict confidence.

Name(s) _____ Date of Birth _____
(1) _____ (1) _____
(2) _____ (2) _____
Address _____
City _____ State _____ Zip Code _____
Phone _____ Email _____

Type of Gift

- Bequest through a will
- Bequest through a trust
- Retirement Account Beneficiary Designation
- Life Insurance Beneficiary Designation
- Other _____

Gift Details (as applicable)

Note: Documented revocable gifts with an estimated value over \$100,000 receive enhanced recognition and benefits.

Estimated value or estimated range of gift _____
Percentage allocation _____
Account information for beneficiary designations _____
My/our gift provides Unrestricted support to the CSO Support to the CSO Endowment Fund
Restricted support to the Civic Orchestra of Chicago Negaunee Music Institute

Please also consider providing the CSOA with copies of documents that include details of your planned gift.

Recognition

All donors who have included the CSO in their plans are welcomed as members of the Theodore Thomas Society. We are honored to thank those who made this generous planned commitment through various Society programs.

Please list me/us as members of the Theodore Thomas Society as follows:

 I/We would like to receive CSOA updates and invitations, including communications to all Theodore Thomas Society members, at the email address above.

I/We would like to remain as an Anonymous member of the Theodore Thomas Society

Signature(s) _____ Date _____
_____ Date _____

Please return this completed form to the CSO at 220 South Michigan Avenue Chicago, IL 60604

You can also email to gifts@csso.org or fax to 312.294.3167

Chicago Symphony Orchestra Tax ID 36-2167823 | (p)312-294-3100 | www.csso.org/plannedgiving

Thank you for including the Chicago Symphony Orchestra Association in your estate plans!