



THE LEGACY SOCIETY

The Charleston Symphony Orchestra (CSO) has established the Legacy Society to recognize our dedicated patrons and donors who have chosen to leave a legacy to the Symphony through a commitment in their Will, Trust, Life Income Plan, Life Insurance, or another type of estate plan.

ACKNOWLEDGEMENT OF ESTATE BENEFICIARY STATUS

Please be advised that the following person: _____ has named the Charleston Symphony Orchestra as a charitable beneficiary in their estate plans through:

- Retirement Plan Asset
Charitable Lead Trust
Charitable Remainder Trust
Charitable Gift Annuity
Residuary Clause
Other: (please specify) _____

The approximate value of this gift is \$ _____ (for campaign accounting purposes only)

A gift agreement: [] has [] has not been created

A copy of the estate plan document: [] is [] is not attached

Address: _____

Month and Day of Birth: _____

Donor Name (to be listed in our annual report and program book): _____

- I would be pleased to be publicly acknowledged as a member of the Legacy Society. The amount of my estate intention should remain confidential, but you may count my intention toward campaign goals.
I prefer not to be publicly acknowledged, but I will accept other benefits of membership.

Donor Signature _____

Date _____