



CONFIDENTIAL NON-BINDING ESTATE PLAN DECLARATION

I/We wish to provide a planned gift of support and have made a provision for a gift to The Williamsburg Symphony Orchestra in my/our estate plans. I/We agree to notify WSO of any changes to these plans, and I/we retain the right to change my/our mind and understand that this statement does not obligate me/us or my/our estate in any way. It is my/our intention to provide future support for WSO as follows:

Wills and Revocable Living Trusts

- I/We have made a bequest in my/our will or revocable living trust for WSO for \$_____ (a specific amount).
- I/We have made a bequest for WSO of specific assets as follows_____.
- I/We have made a bequest for WSO for _____ % of my/our estate.
- This bequest will come after the life of my/our spouse/partner, and he/she has an identical provision in his/her will and trust.

Retirement Plans

- I/We have named WSO as a _____% beneficiary of my/our: IRA 401k Other (specify)

Life Insurance Policies

- I/We have named the WSO as a beneficiary of our paid-up policy.

Securities or Other Assets

- Please specify _____

Please provide documentation for WSO records, such as a confirmation of account changes or a codicil.

The current estimated value of my/our bequest is \$ _____.

Recognition

Donors who include The Williamsburg Symphony Orchestra in their estate plans will be enrolled in the John Jamison Legacy Society.

- Please list my/our name as follows: _____
- I/We prefer no public recognition:

Name _____ Date of Birth _____

Spouse/Partner's Name _____ Date of Birth _____

Address _____

City _____ State _____ Zip _____

Phone _____ Email _____

Signature(s) _____ Date _____

Please return form to the WSO office, P.O. Box 400, Williamsburg, VA 23187. For assistance, call 757-229-9857.

Consult your qualified professional advisors on how a gift might best fit into your estate planning and your eligibility for tax benefits. The Williamsburg Symphony Orchestra, incorporated as The Williamsburg Music Association, is a 501(c)(3) charitable organization, EIN 52-1342360.