

# CHORAL SOCIETY OF DURHAM



## Planned Gift Declaration of Intent Form

*Thank you* for considering the Choral Society of Durham as part of your estate plans.

Please complete this form with as much information as you are willing to share. Upon receipt, we will welcome you into CSD's Golden Baton Legacy Society.

Name: \_\_\_\_\_ Spouse name (if applicable): \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State \_\_\_\_ ZIP: \_\_\_\_\_

Preferred Phone: \_\_\_\_\_ Email: \_\_\_\_\_

### Gift Information

I/We have provided a gift to CSD as set forth in my/our:

- |  |  |
|--|--|
| <input type="checkbox"/> Will or Trust               | <input type="checkbox"/> Life Insurance Policy                   |
| <input type="checkbox"/> IRA/Other Retirement Assets | <input type="checkbox"/> Charitable Gift Annuity                 |
| <input type="checkbox"/> Charitable Remainder Trust  | <input type="checkbox"/> Other Asset(s) (please describe): _____ |

The current estimated value of my/our gift is: \$ \_\_\_\_\_

Other details you wish to share: \_\_\_\_\_

### Recognition

- I/We wish for this gift to remain anonymous.
- Please list my/our name(s) thus: \_\_\_\_\_

I/We understand this form does not create a binding obligation. CSD will respect any confidentiality that I/we request. CSD understands that the size of the gift may change.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Please return this form to CSD's Chair of Financial Development, [development@choral-society.org](mailto:development@choral-society.org) or P.O. Box 72182, Durham, NC 27722  
Choral Society of Durham is a 501(c)(3) charitable organization (EIN 56-6070665)  
Contributions are tax-deductible to the extent allowed by law