

Kitchener-Waterloo Symphony Confidential Planned Gift Statement of Intent

I/we would like to build the future of the Kitchener-Waterloo Symphony with the following gift:

- Bequest in my will / our wills in the amount of \$ _____ or _____ % of the residue of my / our estate.
- Life Insurance Value of policy \$ _____
 - KWS is owner and beneficiary
 - KWS is beneficiary only
- RRSP or RRIF (circle one) _____ % of proceeds
- Securities
- Trust
- Other:

Designation:

- My gift is unrestricted.
- My gift is to support _____
- I prefer to make my gift to the Kitchener-Waterloo Symphony Foundation Inc.

Unless otherwise specified, KWSF has the option to capitalize endowed gifts for 10 years at which time the capital of the gift can also be accessed. Gift capital is only accessed under extreme circumstances, for example \$0 endowment income draw due to poor market performance. Please check this box if your wish is to permanently endow your gift

As a planned gift donor, you automatically become a member of the Dr. Glenn Kruspe Society.

- I / we would like to be recognized as stated below
- I / we would like to remain anonymous until the gift is realized, then recognized as:

(please provide your name/names as you would like to see in any print recognition)
- I / we would like to remain anonymous in perpetuity

Date Signature Print Name

Date Signature of Spouse (if applicable) Print Name

Please note that this document is for our information purposes only and is not legally binding.

If you have any questions, or to return this form, please contact Michelle Cutts, Director of Development & Donor Relations at 519.745.4711 x.279 or mcutts@kwsymphony.on.ca By mail at the Conrad Centre for the Performing Arts, 36 King St. W. Kitchener, ON N2G 1A3.