



The Encore Society: Notification Form for Planned Giving

You can make the ultimate investment in the CSO by remembering us in your will. Most of the planned giving methods cost nothing to you today, but provides future, ongoing positive impact to the CSO's mission. By remembering the CSO in your Planned Gift, you are ensured that your investment will continue to prosper and pay dividends well beyond the financial.

Donor name(s) _____

Please list your name(s) as you wish to appear in our records and donor recognition materials.

☐ I /we wish to remain anonymous.

Address _____

City _____ **State** _____ **Zip code** _____

Home phone _____ **Alternate phone** _____

Email _____

I/we are pleased to join the Encore Society with a planned gift to the Chattanooga Symphony & Opera which was executed on (month/day/year): _____.

Description of planned gift:

- ☐ Bequest under will ☐ Retirement Plan ☐ Charitable Trust
☐ Life Insurance ☐ Real Estate
☐ Other (described here): _____

Please check all that apply:

- ☐ A specific amount. Amount of gift (optional): \$ _____
☐ A percentage of estate: _____%. Estimated value (optional): \$ _____
☐ Remainder of estate. Estimated value (optional): \$ _____
☐ Contingency.
☐ Other: _____

If applicable, the purpose/designation of my/our gift: _____

Optional: We welcome attachments that list your professional advisor(s) as well as copies of the section(s) of wills, trusts, insurance or other documents that mention the CSO.

Donor Signature(s) _____ **Date** _____

Please return completed notification forms to:

Chattanooga Symphony & Opera, Attn: Encore Society, 736 Georgia Ave. Suite 101, Chattanooga, TN 37402
For questions or more information, please contact Paul Smith by phone at 423.267.8583 ext. 2103 or by email at psmith@chattanoogasympphony.org.