



New Intention Updated Intention

NAME(S): _____

ADDRESS _____ CITY _____ STATE _____ ZIP _____

PHONE _____ EMAIL _____

PREFERENCES

I/We wish to provide a planned gift of support and have made a provision for a gift to the Caramoor Center for Music and the Arts in my/our estate plans. It is my/our intention to leave a planned gift through my/our:

- | | |
|---|--|
| <input type="checkbox"/> Will or Trust | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Charitable Lead Trust | <input type="checkbox"/> Donor Advised Fund Remainder |
| <input type="checkbox"/> Life Insurance Policy | <input type="checkbox"/> Other Asset(s) (please describe): |
| <input type="checkbox"/> Retirement Plan/Beneficiary Designation
<i>(401(k) 403(b), IRA, Keogh, Brokerage Account)</i> | |

I/We would like to inform the Caramoor Center for Music and the Arts, for long-term planning purposes only, that, as of this date, the estimated value of my/our gift is \$ or % of my/our estate. I/We understand that my/our estate is not legally bound by this statement and at any time I/we may choose to add, subtract, or revoke Caramoor as beneficiary of this planned gift.

Gift Purpose:

- Unrestricted Endowment
- Other (Please indicate below – briefly describe the program or fund you would like your gift to benefit. If multiple areas, please provide percentages or specific amounts).

RECOGNITION

Donors who include Caramoor in their estate plans will be enrolled in the Caramoor Encore Society.

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

SIGNATURE _____ DATE _____

SIGNATURE _____ DATE _____