



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:

- Will or Trust
- Charitable Lead Trust
- Life Insurance Policy
- Retirement Plan/Beneficiary Designation
(401(k) 403(b), IRA, Keogh, Brokerage Account)
- Charitable Remainder Trust
- Donor Advised Fund Remainder
- Other Asset(s) (please describe):

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:

- General Endowment (Unrestricted)
- Other (Briefly describe the program or fund you would like your gift to benefit, i.e. programming, buildings and grounds) *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 _____