

Planned Gift Notification

Thank you for thoughtfully and generously including a gift to the Musical Instrument Museum (MIM) in your estate plan. Please complete this form with as much detail as you are willing to share and email it to philanthropy@MIM.org. Information about your gift will remain confidential and does not create a binding obligation.

Name _____ Birth Date _____

Name _____ Birth Date _____

Address _____

Phone(s) _____

Email(s) _____

Description of Planned Gift

Please indicate below how your future gift intention will be fulfilled for MIM.

- Will
- Revocable living trust
- Life insurance policy
- Retirement plan beneficiary designation
- Charitable lead trust (CLT) beneficiary designation
- Charitable remainder annuity trust (CRAT) beneficiary designation
- Charitable remainder unitrust (CRUT) beneficiary designation
- Other (please specify): _____

Approximate value of gift: \$ _____

% _____ of estate
Even 1% of your estate can make a big impact.

Documentation: It is helpful when receiving your planned gift if we have copies of your gift document on file. Please provide copies of any documents, or the relevant pages, that include provisions for MIM that you wish to share with us.

Purpose of Planned Gift

- This gift is unrestricted and may be used where the need is greatest at MIM.
- I/We wish to specify that my/our gift be used for the following purpose(s):

- If this purpose is not feasible, my gift may be used where the need is greatest at MIM.

Contact Information

The professional contact person (such as your attorney) for this gift is:

Name and Title _____

Company _____

Address _____

Phone _____ Email _____

MIM's *Legacy Circle*: Planned Giving Society

- I/We wish to join MIM's *Legacy Circle* and be recognized publicly as:

- I/We wish to join MIM's *Legacy Circle* but **do not** wish to be recognized publicly.

- I/We wish for this planned gift to remain anonymous and decline the benefits of MIM's *Legacy Circle*.

Donor Signature _____ Date _____

Donor Signature _____ Date _____