



Opera In Williamsburg (OIW)

CONFIDENTIAL NON-BINDING ESTATE PLAN DECLARATION

I/We wish to provide a planned gift of support and have made a provision for a gift to Opera in Williamsburg in my/our estate plans. I/We agree to notify OIW of any changes to these plans, and I/we retain the right to change my/our mind and understand that this statement does not obligate me/us or my/our estate in any way. It is my/our intention to provide future support for OIW as follows:

Wills and Revocable Living Trusts

- I/We have made a bequest in my/our will or revocable living trust for OIW for \$ _____ (a specific amount).
- I/We have made a bequest for OIW of specific assets as follows _____.
- I/We have made a bequest for OIW for _____ % of my/our estate.
- This bequest will come after the life of my/our spouse/partner, and he/she has an identical provision in his/her will and trust.

Retirement Plans

- I/We have named OIW as a _____ % beneficiary of my/our: IRA 401k Other (specify)

Life Insurance Policies

- I/We have named the OIW as a beneficiary of our paid-up policy.

Securities or Other Assets

- Please specify _____

Please provide documentation for OIW records, such as a confirmation of account changes or a codicil.

The current estimated value of my/our bequest is \$ _____.

Recognition

Donors who include Opera in Williamsburg in their estate plans will be recognized in our programs if desired and receive invitations to the OIW special Donor's Receptions.

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

Name _____ Date of Birth _____

Spouse/Partner's Name _____ Date of Birth _____

Address _____

City _____ State _____ Zip _____

Phone _____ Email _____

Signature(s) _____ Date _____

Please return form to the OIW office, P.O. Box 2041, Williamsburg, VA 23187. For assistance, call 757-254-1149.

Consult your qualified professional advisors on how a gift might best fit into your estate planning and your eligibility for tax benefits. Opera in Williamsburg, Inc., is a 501(c)(3) charitable organization, EIN 47-5511655.