

CONFIDENTIAL BEQUEST INTENTION FORM

Thank you for ensuring the future of Milwaukee Ballet through a bequest or other planned gift. Please complete this Confidential Bequest Intention Form in order to share with us your gift commitment, in as much or as little detail as you wish.

Your response will remain confidential. This form is not a pledge or binding agreement.

Contact Information

Name(s): _____

Address: _____

City/State/ZIP: _____

Telephone: _____ Email: _____

Gift Information

I/we have made the following provision for Milwaukee Ballet:

- A gift in my will or trust
- A gift of retirement plan assets
- A gift of life insurance proceeds
- Other gift provision _____

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

I/we would like this gift to benefit:

- Where the need is greatest
- A specific program: _____
I/we understand and agree that, should it ever become impossible or impractical to use the gift for the purpose specified in this agreement, the Milwaukee Ballet Board of Directors, in their discretion, may use my bequest to the support of any other uses most similar to my/our original interest and intent.

Additional
Comments: _____

Please continue to the reverse side to complete the form.

Recognition

Donors who provide a planned gift to Milwaukee Ballet will be enrolled in the Encore Society.

Please list my/our names as follows: _____

I/we wish to remain anonymous.

Additional Contact Information (optional)

Please list any other contact information you may want us to know (family, attorney, etc.).

Name: _____ Relationship: _____

Address: _____

City/State/ZIP: _____

Telephone: _____ Email: _____

Donor Signature: _____

Date: _____

Please return this form to:
Ivana Bajic, Development Manager – Donor Relations
Milwaukee Ballet
Baumgartner Center for Dance
128 N. Jackson Street
Milwaukee, WI 53202
(414) 902-2107 ibajic@milwaukeeballet.org