PLANNED GIFT ACKNOWLEDGEMENT/CONFIRMATION FORM

The Katharine Hepburn Cultural Arts Center is a 501(c)(3) non-profit arts organization, EIN# 51-0646562.

The Katharine Hepburn Cultural Arts Center (the Kate) expresses its appreciation for your willingness to support the Kate’s future through an estate commitment (planned gift). Please take a moment to complete this confidential form to the best of your ability and return it as a confirmation of your intentions. As a result of your contribution, you will be recognized as a member of the Golden Pond Legacy Society. The Kate will automatically list donors’ names in our annual report unless otherwise noted on this form.

I/we confirm the following planned gift to the Katharine Hepburn Cultural Arts Center:

☐ Will or Trust: Stated as: ____________%    Cash amount $ ________________
   Residual ________________ (A bequest of all or part of the remainder of your estate after other planned gifts, debts, taxes, and expenses are paid)

☐ Individual Retirement Account (IRA) beneficiary. % ____________ (if applicable)

☐ Charitable Gift Annuity: Full purchase value (total value of combined annuities if more than one):
   $ _______________

☐ Charitable Remainder Trust:    Principal value: $ _________________

☐ Life Insurance Policy ☐ Whole/Universal Life ☐ Term Policy    Death benefit: $ ________________

☐ Gift of Real Estate: Address/Description ________________________________________________

☐ Stock/Securities: Description __________________________________________________________

☐ Other gift(s) and/or restriction(s) [e.g., arts education programs, Museum] ________________

Name/Name of Spouse if applicable

Preferred Address/City/State/Zip    Phone    E-mail

Recognition: ☐ I/we wish to remain anonymous

__________________________________________    __________________________
Signature/Date    Spouse Signature    Date

RETURN TO: The Kate - Development Office, 300 Main Street, Old Saybrook, CT 06475 or e-mail to Robin.Andreoli@thekate.org.
Please call 860-510-0473 x213 with questions.

THANK YOU!