

STRATHMORE

Con Brio Society

DECLARATION OF FUTURE INTENT

Thank you for your intent to include Strathmore in your estate plan. To accurately document your wishes, please complete this form with as much detail as you are willing to share. Any information about your gift will remain confidential and does not create a binding obligation. Please consult with your tax or financial advisors to determine the best charitable giving strategies for you.

MY INFORMATION

Name: _____

Street: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____ Date of Birth: _____

GIFT INFORMATION

To help Strathmore plan for the future, I wish to inform Strathmore that I have made the following provision:

- ☐ Will or Trust
- ☐ Life Insurance Policy
- ☐ Retirement Plan or Beneficiary Designation (IRA, 401k, 403b, financial account)
- ☐ Other Asset(s) (please describe): _____

The current estimated value of my gift is \$_____ or _____% of the asset indicated above.

- ☐ I have included a copy of the portion of my estate document that names Strathmore.
I understand that it will be kept in their confidential files.

I wish to direct my support to the following:

- ☐ Artistic Programming
- ☐ Education and Community Outreach Initiatives
- ☐ Strathmore's Permanent Endowment
- ☐ Where Strathmore's needs are greatest

Other information I would like to share (e.g. contact information of your estate advisor, contingency provisions related to your gift, etc.)

RECOGNITION

Membership in the Con Brio Society is reserved for individuals who have made a provision for Strathmore in their estate plans.

- ☐ I agree to have my name included in Con Brio Society donor lists to inspire others to create a legacy through Strathmore. (Note: Gift amount will remain confidential.)
- ☐ Please list my/our name(s) as follows: _____
- ☐ I would like to remain anonymous. Please do not include my name in any public donor listings.

I understand this form does not create a binding obligation and any details about my gift will remain confidential. Strathmore understands that the size of my future gift may change.

Signature:_____ Date:_____

Spouse/Partner Signature (if joint):_____ Date:_____

Strathmore Signature:_____ Date:_____

SHARE YOUR STORY

We encourage you to share what inspired your gift so that we may honor your philanthropic wishes.

NEXT STEPS

We are grateful for your generosity and dedication to the arts. Please send this form and copies of any relevant documents to:

Erin Phillips, Director of Donor Engagement
Strathmore, 5301 Tuckerman Lane, North Bethesda, MD 20852
ephillips@strathmore.org | 301.581.5160

Thank you!