



Orpheus Society: Legacy Gift Intention & Confirmation Form

Thank you for your thoughtful commitment to ensuring the future of The Dallas Opera through a legacy gift. Members of the Orpheus Society play a vital role in sustaining artistic excellence for the next generation of opera patrons.

This form is intended to document your current plans and is **non-binding**. All information provided will be kept confidential.

Donor Information

Full Legal Name: _____

Preferred Name (for recognition): _____

Spouse/Partner Name (if applicable): _____

Mailing Address:

City: _____ **State:** _____ **ZIP:** _____

Phone: _____

Email: _____

Gift Information

I/We have made provisions for a future gift to **The Dallas Opera**, a nonprofit organization located in Dallas, Texas, as follows:

- ☐ Bequest in Will or Trust
- ☐ Retirement Plan or IRA Beneficiary Designation
- ☐ Life Insurance Policy
- ☐ Charitable Remainder Trust
- ☐ Charitable Lead Trust
- ☐ Donor-Advised Fund
- ☐ Other (please describe): _____

Estimated Value of Gift (optional but appreciated):

- ☐ Exact Amount: \$ _____
- ☐ Estimated Amount: \$ _____
- ☐ Percentage of Estate/Asset: _____ %
- ☐ Prefer not to disclose at this time
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Purpose of Gift

- ☐ Unrestricted (to be used where the need is greatest)
- ☐ Restricted (please describe purpose):
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Note: All restricted gifts are subject to review and acceptance by The Dallas Opera.

Documentation (Optional but Helpful)

To assist The Dallas Opera in future planning, I/we have provided or intend to provide:

- ☐ Copy of relevant portion of will or trust
- ☐ Beneficiary designation confirmation
- ☐ Letter from legal or financial advisor
- ☐ Other: _____
- ☐ I/We prefer not to provide documentation at this time
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Recognition

- ☐ I/We would like to be recognized as members of the Orpheus Society
- ☐ I/We prefer to remain anonymous

Recognition Name (if applicable):

Statement of Intent

I/We understand that:

- This document is **not a legally binding obligation** and may be modified or revoked at any time.
 - The Dallas Opera has not provided legal or tax advice regarding this gift.
 - I/We have been encouraged to consult with independent legal and financial advisors.
 - Any restricted gift is subject to acceptance by The Dallas Opera and must be consistent with its policies and mission.
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Optional Contact Request

- ☐ I/We would welcome a confidential conversation about this gift
- ☐ Please provide additional information about legacy giving options
- ☐ No follow-up is needed at this time
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Signatures

Donor Signature: _____ Date: _____

Co-Donor Signature: _____ Date: _____

For Office Use Only

Date Received: _____

Staff Member: _____

Notes:

Return Information

Please return this form to:

The Dallas Opera

Attn: Mr. Samuel F. Stiles

2403 Flora Street, Suite 500

Dallas, TX 75201

214-443-1086

samuel.stiles@dallasopera.org