



Beneficiary Designation Notice*

Interlochen Center for the Arts invites you to become a member of the Heritage Society, our recognition club for donors who have made a planned gift benefitting Interlochen. To become a member, simply fill out this form telling us about the beneficiary designations you have made benefitting Interlochen. We value your future gift and want to properly thank you and acknowledge your thoughtfulness!

- I understand that listing this gift in donor honor rolls may be an incentive for others to give, and I am willing to be publicly acknowledged.
- I prefer not to be listed or acknowledged publicly.
- I prefer to remain anonymous and request no contact or acknowledgement regarding this gift.

I have designated Interlochen as a _____% beneficiary of my IRA or other retirement or investment account. That account is invested with _____ and my future gift has a current **estimated value** of \$_____.

I have designated a specific gift of \$_____ for Interlochen from my IRA or other retirement or investment account. That account is invested with_____.

I have designated Interlochen as a _____% beneficiary of my insurance policy. That policy is with _____ and my future gift has a current **estimated value** of \$_____.

- My future gift is unrestricted.
- I direct Interlochen Center for the Arts to use my future gift for a specific purpose. The specific purpose is as follows:_____.

For recognition purposes, please list my/our name(s) as: _____

Signature: _____ Date: _____

Address: _____

Email: _____

Phone: _____

****This is a confidential record. I understand that I am not making a legal or binding commitment upon my estate by submitting this form. Further, Interlochen Center for the Arts understands and acknowledges that the size of my future gift may be significantly different from the amount estimated above for the purposes of valuation.***