



Cumberland Valley School of Music

Bequest Intention Form

My/our current intention is to include CVSM in our estate plan in the following manner:

- Outright bequest of a fixed dollar amount (optional: \$ _____ to CVSM)
- Percentage of estate to CVSM (optional: _____% estimated current value of the portion \$ _____)

By naming Cumberland Valley School of Music as a beneficiary:

- in a will or living trust (Executor: _____)
- in a retirement plan – IRA, 401(k), 401(b), etc. (Administrator: _____)
- in a bank/investment account (Institution: _____)
- in other: _____

With the following intended purpose for my planned gift:

- Where the need is the greatest.
- For a specific purpose: _____

Other Details: _____

Optional: Please consider attaching current documentation of your planned gift to CVSM for our current records.

Name(s): _____

Address: _____

City _____ State _____ Zip _____

Email _____ Phone _____

CVSM is pleased to recognize planned giving donors to CVSM with membership in the Legacy Circle.

If you wish to remain anonymous regarding this intended gift, check this box:

I/we retain the right to change our minds as to our designation of CVSM as a beneficiary, as to the purpose of our planned gift, and as to the portion and/or amount of our estate currently designated for CVSM.

Signature: _____ Date: _____

Signature: _____ Date: _____

See Reverse Side for Additional Information and Instructions.

Sample Bequest Language

The provision in your will or revocable living trust providing for a gift to Cumberland Valley School of Music should reflect your own unique circumstances and charitable objectives. We hope these samples will be helpful to you and your attorney.

Unrestricted Gift:

I, (name) of (city, state, ZIP). Give, devise, and bequeath to Cumberland Valley School of Music (written amount or percentage of the estate or description of property) for its unrestricted use and purpose.

Gift for a Specific Purpose:

I, (name) of (city, state, ZIP). Give, devise and bequeath to Cumberland Valley School of Music (written amount or percentage of the estate or description of property) for the following purpose: (a specific purpose such as providing for scholarship support to students or supporting a particular program of CVSM). If at any time in the judgement of CVSM it is impossible or impracticable to carry out the purpose I have designated, the school shall determine and alternative purpose as near as possible to the designated purpose.

Gift from Investment or Retirement Accounts:

You may choose to designate Cumberland Valley School of Music as beneficiary of all or part of your investment account or retirement account. The form may ask for CVSM's tax identification number, which is 25-1629280, address (located below) and or institutional charter date which is October 19, 1990.

For information or additional assistance, please contact:

Heather McEndree, Executive Director, at hmcendree@cvsmusic.org or 717-261-1220

Please return this completed form to:

Cumberland Valley School of Music

Heather McEndree

1016 Philadelphia Avenue

Chambersburg, PA 17201