



Bequest Intention Form
CONFIDENTIAL

Please use this form to share the details of your bequest intentions with Berkshire Choral International. In recognition of your decision, we will be honored to invite you to join our **Da Capo Society**, a select group of donors who have created a future gift intention to support BCI. If your plans change, you are always free to update your bequest intention at any time. This document is non-binding and informational only.

1. _____ **There is a bequest in my/our will or trust to benefit Berkshire Choral International**

- ☐ A specific dollar amount: \$ _____
- ☐ A percentage of my/our estate: _____ %
- ☐ The residual of my/our estate
- ☐ Enclosed is a copy of the relevant provision in my/our will
- ☐ I/we prefer not to specify at this time

2. _____ **Berkshire Choral International is a/the beneficiary of my IRA or other retirement plan and/or**

_____ **is the beneficiary of:**

- ☐ A Charitable Remainder Trust
- ☐ A Life Insurance Policy
- ☐ A Financial or Investment Account

Optional: Currently, I/we estimate that this may result in a gift of: \$ _____

_____ I/We hereby give permission to Berkshire Choral International to use my/our name/Fund in its Da Capo Society listing.

_____ I/We hereby choose to have my/our name(s) remain anonymous.

Signed: _____ Date of Birth: _____ Dated: _____

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Mail to: Berkshire Choral International, 75 North St, Suite 310, Pittsfield MA 01201 • 413-229-8526
Tax I.D. # 13-2586807

Contact Information

Donor(s)

Name (s): _____

Address: _____

City: _____ State: _____ Zip: _____

Home Ph: _____ Cell: _____ Email: _____

Optional: _____

Attorney

Name/Company: _____

Address: _____

City: _____ State: _____ Zip: _____

Work: _____ Cell: _____ Email: _____

Financial Advisor

Name/Company: _____

Address: _____

City: _____ State: _____ Zip: _____

Work: _____ Cell: _____ Email: _____

The following provides typical language to include a charitable bequest in your will. Please consult with your attorney.

Sample Bequest Language

1. Percentage: "I give to Berkshire Choral International, a nonprofit corporation of the state of Massachusetts, tax identification # 13-2586807, located at 75 North St, Suite 310, Pittsfield MA 01201, _____% of my estate."

2. Specific: "I give to Berkshire Choral International, a nonprofit corporation of the state of Massachusetts, tax identification # 13-2586807, located at 75 North St, Suite 310, Pittsfield MA 01201, (Choose one or more that apply):

a. The sum of \$_____

b. _____ shares of stock in _____ Company

c. My real property commonly known as _____."

3. Residual: "I give to Berkshire Choral International, a nonprofit corporation of the state of Massachusetts, tax identification # 13-2586807, located at 75 North St, Suite 310, Pittsfield MA 01201, all the residue of my estate, including real personal property."

4. Contingent: "In the event of the death of any of the beneficiaries, I give to Berkshire Choral International, a nonprofit corporation of the state of Massachusetts, tax identification # 13-2586807, located at 75 North St, Suite 310, Pittsfield MA 01201, _____." (a percentage, specific, or residual language as above)