



Jim Nadel Society Letter of Intent

INTENTION

I have made/intend to make a provision for Stanford Jazz Workshop in my estate plan through:

- WILL (DESIGNATE STANFORD JAZZ WORKSHOP, EIN 94-3074721)
- LIFE INSURANCE POLICY OR RETIREMENT PLAN BENEFICIARY DESIGNATION
- TRUST IN WHICH STANFORD JAZZ WORKSHOP IS NAMED AS A BENEFICIARY. INDICATE WHEN SJW'S INTEREST WILL TAKE EFFECT: FOR EXAMPLE, "INCOME TO MY SPOUSE, THEN PRINCIPAL TO SJW."
- DEFERRED GIFT: CHARITABLE GIFT ANNUITY, CHARITABLE REMAINDER TRUST, CHARITABLE LEAD TRUST, ETC.
- OTHER _____
- A COPY OR EXCERPT OF MY DOCUMENT IS ENCLOSED (OPTIONAL, EXCEPT FOR IRREVOCABLE TRUSTS)

Optional: Estimated amount of gift is \$_____ or _____% of estate.

PROFESSIONAL ADVISOR

I have notified the following advisor, executor, or trustee of this gift:

Name _____

Address _____

City _____ State _____ Zip _____

Phone _____ Email _____

MY INFORMATION

Name _____

Address _____

City _____ State _____ Zip _____

Phone _____ Email _____

Name(s), as you would like it/them to be listed in publications and materials:

_____ I/We wish to remain anonymous.

This document verifies my intent to support Stanford Jazz Workshop through my estate. I understand that it is not legally binding.

Signature _____ Date _____

Please return the completed form to Stanford Jazz Workshop
PO Box 20454, Stanford CA 94309 | 650-736-0324 phone | mhernandez@stanfordjazz.org
Stanford Jazz Workshop's federal tax ID number is 94-3074721.