

PLANNED GIVING NOTIFICATION FORM

I (We) have included The Phillips Collection as a beneficiary of my/our trust or estate plan through (check all that apply):

- ☐ Will or Trust ☐ Life Insurance Policy
- ☐ Charitable Remainder or Lead Trust ☐ Percentage or Remainder of Retirement Fund/IRA
- ☐ Other Item or Asset (for example, private collections, real estate, etc.): _____

I (We) estimate the current value of the gift to be: \$ _____

IT IS MY WISH THAT THE GIFT BE USED:

- ☐ At The Phillips Collection's discretion, to create the greatest impact at the museum by supporting its most compelling needs and opportunities.
- ☐ Endowment—to help ensure that The Phillips Collection will be here for the next generation
- ☐ For the following purpose: _____

RECOGNITION

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

- ☐ I (we) permit The Phillips Collection to use my/our name(s) in public listings of donors.
- ☐ I (we) prefer to remain anonymous during my/our lifetime(s). You may recognize my/our gift after you receive it.
- ☐ I (we) prefer to remain anonymous during and after my/our lifetime(s).

DONOR INFORMATION

NAME _____ NAME OF SPOUSE (IF APPLICABLE) _____

STREET ADDRESS _____ CITY _____ STATE _____ ZIP _____

PHONE NUMBER _____ EMAIL _____

DONOR SIGNATURE(S) _____ DATE _____

Thank you for your commitment to The Phillips Collection and your investment in its future. In recognition of your planned gift, we are pleased to invite you to become a member of the museum's legacy giving group—the Eliza Laughlin Society.

If you have any questions, contact Julie Carter, Senior Planned Giving Officer:
plannedgiving@phillipscollection.org or 202.387.2151 x229

Please return this form with any gift documentation you are comfortable sharing. All documents will be held in confidence and used solely for the records of the Phillips Advancement Office. The Phillips Collection understands that the value of a future gift, as well as the circumstances of the gift, may change at any time. Please notify us of any changes in your estate plans impacting your planned gift.