Eugene Ballet is

My Legacy

EUGENE BALLET | 174 E 16TH AVE. EUGENE, OR 97401 | 541-485-3992

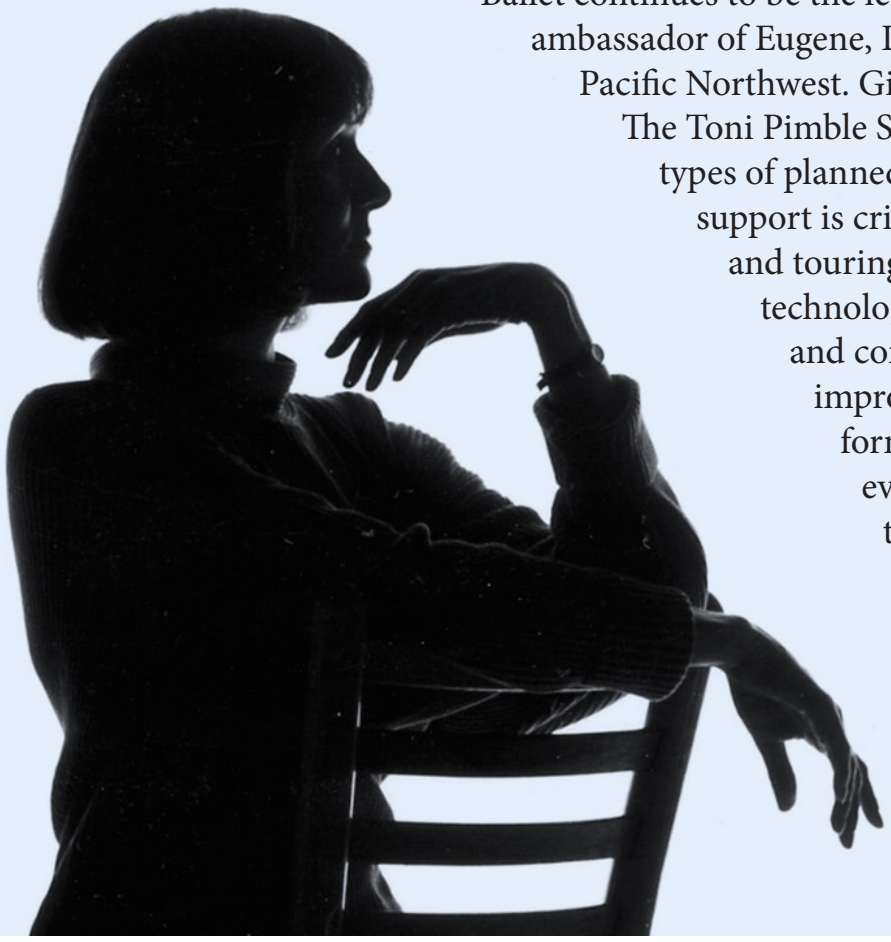
What Will Your Legacy Be?

Eugene Ballet welcomes the opportunity to recognize donors for their generosity at all levels and has created this guide for those who wish to consider and potentially designate planned gifts to the Company. In this guide you will find details on types of gifts, a planned gift notification form, and sample bequest language. For more information and assistance with policies, processes and acknowledgement please contact:

Eugene Ballet
541-485-3992

Toni Pimble Society

The Toni Pimble Society recognizes donors who have arranged legacy gifts to Eugene Ballet. In honor of Toni's vision and determination, this society was created to steward and thank those, who like her, have dedicated resources to ensure Eugene Ballet continues to be the leading ballet company and cultural ambassador of Eugene, Lane County, Oregon, and the Pacific Northwest. Gifts that provide membership in The Toni Pimble Society include bequests and other types of planned giving vehicles. This important support is critical for world-class performances and touring, scholarships and education, technology improvements and innovation, and community outreach programs that improve access and exposure to the art form. Toni believes that ballet is for everyone, and legacy giving ensures that inclusivity. The following guide describes a variety of planned giving vehicles. We encourage supporters of Eugene Ballet to work with Development staff, and with their financial and legal advisors, to appropriately structure their planned gifts.



Your Gift Supports

Performances

Eugene Ballet Academy

The Midtown Arts Center

Preservation of the Classics

Creation of New Works

Artistic Collaborations

"For over 45 years, this community has supported, nurtured, and loved this institution, claiming it as their own. With that ownership comes a responsibility to make sure that the ballet doesn't just survive another 45 years, but thrives."

-Monique Mulbry, Board Vice President

Types of Gifts

	HOW IT WORKS	YOUR BENEFITS
BEQUEST IN YOUR WILL	Name Eugene Ballet in your will	• Control of assets for your future • Donation exempt from future federal estate tax
REVOCABLE LIVING TRUST	Name Eugene Ballet as the beneficiary of assets	• Control of the trust for your life • Gift in trust exempt from future federal estate tax
GIFT OF LIFE INSURANCE	Name Eugene Ballet as the owner and beneficiary of policy	• Immediate income tax deduction • Possible future deductions through gifts to pay policy premiums
GIFT OF RETIREMENT ASSETS	Name Eugene Ballet as the beneficiary of the balance left after your lifetime using the plan's beneficiary form	• Giving from the most highly taxed assets leaves more to heirs • Eliminates income and estate taxes
GIFT OF RETAINED LIFE REAL ESTATE	Deed ownership of a personal residence or vacation home to Eugene Ballet while retaining occupancy throughout your life	• Income for life and long-term hedge against inflation • Immediate income tax charitable deduction
CHARITABLE REMAINDER UNITRUST*	Use a trust that pays a fixed percentage of trust's assets as revalued annually. Remainder goes to Eugene Ballet after your lifetime	• Variable income for life and long-term hedge against inflation • Immediate income tax charitable deduction
CHARITABLE REMAINDER ANNUITY TRUST*	Use a charitable trust that pays you a set income annually. Remainder goes to Eugene Ballet after your lifetime.	• Fixed payments for life • Immediate income tax charitable deduction
CHARITABLE LEAD TRUST*	Use a charitable trust that pays fixed or variable income to Eugene Ballet for a specific term, and thereafter assigns the balance to heirs	• Reduces your taxable estate • Property retained by heirs, often with reduced gift taxes

*Note: Eugene Ballet cannot serve as Trustee for charitable trusts but would be pleased to work with you and your banking partner to set up these instruments.

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Planned Gift Notification Form

GIFT DETAILS

I/we have made the following provision for a gift:

_____ I have included Eugene Ballet in my will or living trust

_____ I have named Eugene Ballet as beneficiary of a life insurance policy

_____ I have named Eugene Ballet as the owner and beneficiary

_____ I have named Eugene Ballet as the owner and beneficiary of a life insurance policy (immediate tax deduction available)

_____ I have named Eugene Ballet as beneficiary of a retirement account

_____ I have arranged a trust or other planned gift for the benefit of Eugene Ballet

_____ Please send me information on charitable trust annuity option

Please provide Eugene Ballet with a copy of relevant documentation.

OUR ACKNOWLEDGEMENT OF YOUR GENEROSITY

Eugene Ballet is pleased to recognize donors for their comprehensive generosity, including planned gifts, in lifetime and campaign giving levels. We are happy to work with you to acknowledge your generosity in a format that is meaningful to you and your legacy.

Please provide an estimated value of your planned gift:

$ _____

We are proud to honor those who have made planned gifts to Eugene Ballet with membership in The Toni Pimble Legacy Society.

_____ I/we would like to be listed as follows _____ I/we prefer not to be listed

Name(s): _____

Printed Name: _____ Date of Birth: _____

Signature: _____ Date: _____

Sample Bequest Language

If you already have a will, you can add a bequest to Eugene Ballet by means of a simple document called a codicil. In some cases, donors who have revocable living trusts choose to make a future gift to Eugene Ballet through the equivalent of a bequest, namely through a charitable distribution provision in the trust agreement. Usually, an existing trust agreement can easily be amended to include such a provision. Regardless of the instrument you use, be sure to seek the assistance of your attorney.

UNRESTRICTED BEQUESTS

Specific Sum of Money
"I give to Eugene Ballet, an Oregon non-profit corporation, 174 East 16th Ave, Eugene OR 97401, Federal Tax Id: 93-0765746, or its successor organization, the sum of [insert the exact dollar amount]."

Specific property such as real estate, stocks, bonds, works of art, or other items:
"I give to Eugene Ballet, an Oregon non-profit corporation, 174 East 16th Ave, Eugene OR 97401, Federal Tax Id: 93-0765746, or its successor organization, the sum of [insert a description of the particular property]."

Rest and residue of your estate after paying debts, taxes, expenses, and other bequests:
"I give to Eugene Ballet, an Oregon non-profit corporation, 174 East 16th Ave, Eugene OR 97401, Federal Tax Id: 93-0765746, or its successor organization, all [or a stated percentage] of the rest, residue, and remainder of my estate."

Contingent bequest if you are not survived by certain individuals:
"If [name/s of primary beneficiary/ies] do/es not survive me, or shall die within ninety (90) days from the date of my death, or as a result of a common disaster, then I give to Eugene Ballet, an Oregon non-profit corporation, 174 East 16th Ave, Eugene OR 97401 Federal Tax Id: 93-0765746, or its successor organization, [insert the exact dollar amount, description of property, or percentage of residual estate]."

RESTRICTED BEQUESTS

If the bequest is for a restricted purpose, use the relevant language from the "Unrestricted Bequests" options and designate the particular program, area of activity, or fund to be supported. This is also where you may choose to designate a gift explicitly for Eugene Ballet's endowment.

Example:

"I give to Eugene Ballet, an Oregon non-profit corporation, 174 East 16th Ave., Eugene OR 97401, Federal Tax Id: 93-0765746, or its successor organization, [insert the exact dollar amount, description of property, or percentage of residual estate], to be used for Eugene Ballet Academy scholarships/added to its general (unrestricted), permanent endowment fund."

Additional language: It is recommended that the following paragraph be added whenever the bequest is restricted:

"If, in the opinion of the Board of Directors of Eugene Ballet, it should become impossible, inadvisable, or impractical to use this gift for the specified purpose(s), then the Board may in its discretion use the gift for other purposes, keeping in mind the original wishes of the donor."