

# HELP BUILD A LEGACY



For more information about the Maestro Society and to learn how you can make a planned gift that meets your financial, estate and charitable goals, please contact Elliot Dee, *Director of External Relations*, at [Elliot@DiscoveryOrchestra.org](mailto:Elliot@DiscoveryOrchestra.org) or Ginny Johnston, *Executive Director*, at [Ginny@DiscoveryOrchestra.org](mailto:Ginny@DiscoveryOrchestra.org). We would be happy to discuss your specific circumstances in confidence with you. Please let us know if you have chosen to designate The Discovery Orchestra as a beneficiary of your estate. Thank you!

**THE DISCOVERY  
ORCHESTRA**  
Break Through Classical Music

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## A GUIDE TO PLANNED GIVING



Break Through Classical Music  
**THE DISCOVERY ORCHESTRA**

# Create your Legacy with The Discovery Orchestra!

A PLANNED GIFT CAN BENEFIT YOU, YOUR FAMILY  
AND THE MUSIC YOU LOVE.

## WHAT IS PLANNED GIVING?

Planned giving combines financial, estate and charitable planning—with a focus on meeting your personal goals and needs. It enables you to give from your assets and to make larger gifts than you thought possible, often with significant tax benefits. Planned giving can help you generate predictable income during your lifetime and preserve your wealth for your family while nurturing your favorite charitable causes for future generations.



## SPECIAL RECOGNITION OF PLANNED GIFTS: THE MAESTRO SOCIETY

As a contributor to The Discovery Orchestra's planned giving program, you will join a wonderful group of supporters led by our founder and Artistic Director, George Marriner Maull. Maestro Maull has made a provision in his will for a planned gift to The Discovery Orchestra to support the music listening mission of the Orchestra—his life's work—for future generations. As a member of the Maestro Society you will have the opportunity to enjoy a special relationship with Maestro Maull. Members receive lifetime recognition in The Maestro Society in all of our concert programs and an invitation to an annual event with the Maestro.

## Types of Planned Gifts

From a simple bequest to more complex arrangements, we welcome the opportunity to work with you and your advisors in planning a gift that suits your particular goals and needs. Outlined below are the key features and benefits of different types of planned gifts:



### BEQUEST

A bequest allows you to designate a specific amount or percentage of your estate to The Discovery Orchestra and to realize an estate tax deduction.

### ANNUITY

An annuity provides predictable income to you during your lifetime. Some portion of these payments may be tax-free. A charitable gift annuity may also offer you a current income tax deduction.

### TRUST

With a charitable remainder trust, you pass assets to a trust that will make payments to you for a period of time or life and reduce your income, capital gains and estate tax burdens. A charitable lead trust makes payment to the Orchestra for a set period of time and then returns the assets to your family. A lead trust offers potential gift tax savings to heirs in the future.

### APPRECIATED STOCK

A gift of appreciated stock can benefit the Orchestra immediately, allow you to reduce capital gains taxes and offer substantial income tax savings to you.

### RETIREMENT PLAN

A donation of a retirement plan will allow you to avoid double taxation of retirement assets.

### LIFE INSURANCE

A life insurance gift will allow you to make a large contribution at a small cost to you.

### REAL ESTATE OR OTHER PERSONAL PROPERTY

A gift of real estate, art, collectibles, an automobile or other personal property can benefit the Orchestra immediately, allow you to reduce capital gains taxes and offer substantial income tax savings to you.