

BRAVO! VAIL ENCORE SOCIETY



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Ways to Leave Your Legacy through the Power of Music

There are many ways to create a planned gift, allowing your impact to extend for generations to come.

Bravo! Vail created the Encore Society to honor and recognize those who support us in this way. As you consider the following ideas, please discuss options with your estate or financial planner to help choose the plan that works best for you.

A CHARITABLE BEQUEST WITHIN YOUR LAST WILL AND TESTAMENT

By including Bravo! Vail in your will or living trust, you create a gift today that we will receive when your estate is settled. Bequests are the most commonly used option to provide a legacy gift to help ensure the robust future of Bravo! Vail. Several types of bequests are available, and the following are two examples.

1) As a percentage of your estate: As your estate appreciates, today's bequest will have greater impact in the future. Sample verbiage: *I hereby give, devise, and bequeath ___ percent (___%) of my total estate, determined as of the date of my death, to Bravo! Vail Music Festival, a nonprofit organization located at 2271 N. Frontage Road W., Suite C, Vail, CO 81657, Federal Tax ID #84-1074065, for Bravo! Vail's endowment fund (designated to _____).*

2) A specific dollar amount or specific assets: You determine an exact dollar amount or asset to be provided in your bequest. Sample verbiage: *I hereby give, devise, and bequeath _____ dollars (\$_____) to Bravo! Vail Music Festival, a nonprofit organization located at 2271 N. Frontage Road W., Suite C, Vail, CO 81657, Federal Tax ID #84-1074065, for Bravo! Vail's endowment fund (designated to _____).*



RETIREMENT PLAN

One of the best legacy gift options involves traditional IRAs and retirement plans. When these assets are inherited by loved ones, they also inherit an income tax liability. However, if you name Bravo! Vail as a primary beneficiary (or co-beneficiary) of your retirement account, we receive 100% of your gift with no income tax liability. For this reason, traditional retirement assets are excellent for legacy gifts.

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ZACH MAHONEY

LIFE INSURANCE

You can also name Bravo! Vail as the beneficiary of a new or existing life insurance policy by completing a Beneficiary Designation Form. This gives you the flexibility to change your mind at any time in the future should your needs evolve. You can name Bravo! Vail as the beneficiary or co-beneficiary of a life insurance policy, avoiding the income tax that applies when these assets are inherited by others.

RETAINED LIFE ESTATE / REAL ESTATE

Donate your personal home or residence and retain the right to occupy it for the rest of your life, while receiving tax benefits today. A second home or real estate other than your personal residence may also be donated.

CHARITABLE GIFT ANNUITY

Make a gift today and you (and another person, if desired) will receive fixed payments for life, which you can never outlive. The payments can begin now or at a later date that you choose. The rates are attractive, and you will be eligible for tax benefits, too.

CHARITABLE REMAINDER TRUST

In the right situation, a charitable remainder trust can provide powerful financial, tax, and estate planning benefits. You donate assets into your trust for the eventual benefit of Bravo! Vail. In the interim, the trust pays income to you and/or your designated income beneficiaries. You receive tax benefits, too.

CHARITABLE LEAD TRUST

A charitable lead trust can provide support for Bravo! Vail for a period of time you determine. You donate assets into your trust, and after the trust's term is over, it transfers assets to your heirs with little or no estate or gift tax.

Join the Bravo! Vail Encore Society today and help build a bridge to the future.

With a little planning, you can leave a legacy to ensure that Bravo! Vail will continue enriching people's lives through the power of music for generations to come. Although cash contributions are always appreciated, the creative and flexible options for Encore Society giving can help you meet your estate planning goals while creating a sustainable future for Bravo! Vail.

Leave Your Legacy of Music

You may designate your Encore Society gift to any of these funds:

- Artistic Excellence Fund
- Education and Engagement Fund
- Festival Operations Fund
- New Works Fund

There are many ways to help. Please consider one or more of these options.



Contact Jason Denhart at 970.827.4305 or jdenhart@BravoVail.org to learn more.

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