



Bequests, Wills and Living Trusts

How it Works

In addition to providing for your loved ones, your will or living trust can be one of the most effective ways to make a generous gift to the Detroit Symphony Orchestra. Creating a bequest for the DSO is as simple as stating your intentions when you create your estate plan or will. If you have an existing will or living trust, your attorney can prepare a codicil, or amendment, for you to sign which modifies, explains, or changes your intentions. Bequests in your will or living trust allow you to retain your assets during your lifetime.

Types of Bequests

If you choose to include the Detroit Symphony Orchestra in your will or living trust, there are several types of bequests that allow you to designate how your estate will be distributed.

- **Specific Bequest:** You describe exactly what you want to leave to the Orchestra. You can specify a particular dollar amount, portion (percentage) of your estate, or a particular asset.
- **Residuary Bequest:** You can designate that the Detroit Symphony Orchestra receives all or a portion (percentage) of the remainder of your estate once all specific bequests, debts, expenses, and taxes have been paid.
- **Contingent Bequest:** The contingent bequest is fulfilled if certain conditions are met. For instance, if your primary beneficiary does not survive you, you can indicate a gift to the Orchestra through a contingent designation.

How to Include the Detroit Symphony Orchestra

The following language is an example for how you might word an outright bequest to the Detroit Symphony Orchestra:

*"I give, devise and bequeath to the Detroit Symphony Orchestra, which has a federal tax identification number of **38-1385132** and a current address of 3711 Woodward Avenue, Detroit, Michigan 48201, the sum of _____ (state amount or percentage; or describe the asset) to be used for unrestricted purposes (or general endowment purposes)."*

Benefits

Bequests to the Detroit Symphony Orchestra help reduce the taxes paid by your estate. There is no limit on the amount you can leave to the Orchestra or to other charitable organizations through your will or living trust.

With a little planning, you can help ensure that future music lovers will enjoy world-class performances in Detroit. Thank you for your generous support.

For questions or to discuss your gift intentions please contact:

Dane Lighthart, Director of Individual Giving
(313) 576-3115 | dlighthart@dso.org

DETROIT SYMPHONY ORCHESTRA

1887 Society

The 1887 Society was established by the Detroit Symphony Orchestra to honor individuals who have made a planned gift. For many years, planned gifts have been a major source of support for the Orchestra's operations and endowment. Planned gifts come in many forms including bequests, charitable gift annuities, and life insurance policies.

The year 1887 is the Detroit Symphony Orchestra's very first performance led by conductor Rudolph Spiel on Monday, December 19, 1887 at 8:00 pm at the Detroit Opera House. Since that time, broad-based community support has continued to sustain the DSO. Members of the 1887 Society ensure that future music lovers will enjoy the DSO's world-class performances and programs in Detroit.

1887 Society Membership Benefits

- Ability to purchase single tickets before the general public
- Two passes to the Herman and Sharon Frankel Donor Lounge each season
- Year-round listing in *Performance magazine*
- Donor Lounge rental fee waived for one private event each season

DETROIT SYMPHONY ORCHESTRA
1887 Society

Confidential Enrollment Form

*I/we have included the **Detroit Symphony Orchestra** in my/our estate plans as described on the **reverse side** of this form and wish to enroll in the 1887 Society.*

Name (please print): _____ Date of Birth: _____

Name (please print): _____ Date of Birth: _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____ Email: _____

☐ Please include my/our name in the 1887 Society membership lists.

Please print your name(s) above as you wish it to appear in our donor listings.

☐ I/We wish to remain anonymous.

Signature

Signature

Date

The 1887 Society honors those who have included the Detroit Symphony Orchestra in their future financial plans, such as leaving the DSO as a beneficiary of a will or life insurance policy. As a member you will receive two passes to the Herman and Sharon Frankel Donor Lounge each season, and lifetime recognition in *Performance Magazine* for your generous commitment.

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Please remember to complete the second page of form

DETROIT SYMPHONY ORCHESTRA
1887 Society

☐ I/We have included the Detroit Symphony Orchestra, Inc. in my/our will or revocable trust:

☐ A specific bequest of \$ _____

☐ A percentage bequest of _____ % Estimated value of DSO share: \$ _____

☐ Other (please describe): _____

☐ I/We have made the Detroit Symphony Orchestra, Inc. the beneficiary of:

☐ A life insurance policy Face value: \$ _____ Cash value: \$ _____

☐ A qualified retirement plan or IRA DSO interest: _____ % Estimated value: \$ _____

☐ Other (please describe): _____

☐ I/We have named the Detroit Symphony Orchestra as a beneficiary of an irrevocable trust or life-income arrangement:

☐ Charitable Remainder Trust DSO interest: _____ % Estimated Value \$ _____
Date established: _____ Original Value: \$ _____ Current value: _____

☐ Charitable Lead Trust DSO interest: _____ % Estimated Value \$ _____
Number of years: _____

☐ I/We make this planned gift to the Detroit Symphony Orchestra as:

☐ Unrestricted ☐ Unrestricted Endowment ☐ Other (Please indicate below)

☐ I/We have attached a copy of the portion of my/our planning document(s) that pertains to the DSO.

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