

“Planned giving” refers to gifts that come from your estate. Gifts made in this way allow you to extend your support after life for the organizations or causes you love. Planned giving benefits Grand Rapids Ballet in significant, lasting ways.

- Helps build an endowment that stabilizes annual funding
- Provides cash for specific projects
- Inspire others to leave similar gifts

ACCOMPLISH YOUR GIVING GOALS

Each type of planned gift has different tax implications. You should always consult a tax attorney or financial planner to understand the personal impact of a proposed gift.



Gifts That Are Payable After Death, Such As a Gift from Will or Trust, or a Beneficiary Designation

- Paid after your passing
- You specify an amount or a percentage of your estate as a bequest in your will or trust
- You may be able to make a larger gift from your estate as a bequest in your will or trust
- You may be able to make a larger gift from your estate than during your lifetime
- Don't forget retirement accounts- they are highly taxed if they go to heirs

Gifts of Appreciated Assets, Such As Stocks or Personal Property

- Given during life or as part of a will or trust
- Gifts of stocks and bonds may help you avoid capital gains taxes and cost less than a cash gift

Gifts That Return Income, Such As a Charitable Gift Annuity

- Given during your lifetime
- Portion of the gift receives an immediate tax deduction
- You receive regular payments during your lifetime, a portion of which may be tax free
- Remainder of the gift is available to your designated charity after death

I/WE HAVE MADE PROVISION IN OUR WILL AS FOLLOWS.

Donor Information

Name (please print) _____

Date of Birth ____/____/____

Name (please print) _____

Date of Birth ____/____/____

Address _____

City _____ State _____ Zip Code _____

Phone _____ Email _____

Description of Gift

- Bequest in will or trust
- Charitable Gift Annuity
- Real Estate
- Beneficiary of life insurance plan
- Beneficiary of retirement plan
- Tangible personal property (describe) _____
- Other: _____

Optional Gift Information

- Attached please find a copy of the legal documents pertinent to this gift.
- The approximate anticipated value of this gift is \$ _____.

Donor Recognition

Grand Rapids Ballet periodically publishes lists of donors who have made planned gifts. We hope this will encourage others to make similar gifts. We would be honored to list your name unless you prefer to remain anonymous. All details about the amount or type of gift will remain confidential.

Please list my/our name(s) as follows:

Please do not publish my/our name(s) in connection with this gift

This statement of intent does not constitute a legally binding pledge or agreement for me or for my estate. It documents only my intent, and may be amended at any time.

Signature _____ Date ____/____/____

Signature _____ Date ____/____/____

PLACE
STAMP
HERE

MEIJER-ROYCE CENTER FOR DANCE
341 ELLSWORTH SW GRAND RAPIDS, MI 49503

**GRAND
RAPIDS
BALLET**

Patricia Barker, Artistic Director

CREATE THE FUTURE. PLAN A GIFT TODAY.

Generous people like you make dance in Grand Rapids possible. We sincerely appreciate your faithful support of our mission.

Many of our donors choose to continue their support after life, through a gift from their estate. If you believe in our mission of ballet, and want to invest in our future, we invite you to make such a gift. Let us know your intentions by completing and returning the attached form.

"Act as if what you do makes a difference. It does."

- William James. American Philosopher

GRAND RAPIDS BALLET
341 ELLSWORTH AVE SW
GRAND RAPIDS, MI 49503

www.grballet.com
(616) 454-4771

plannedgiving@grballet.com

**GRAND
RAPIDS
BALLET**

CREATE A LEGACY THROUGH YOUR GIVING

