

# LEGACY NEWS

SPRING 2020

ENSURE THE FUTURE OF DANCE AT SAN FRANCISCO BALLET



San Francisco Ballet in Balanchine's *Rubies*. © Erik Tomasson

## ALL ABOUT BALLET

Even at eight years old, Cecelia Beam knew she wanted a career that allowed her to immerse herself in the ballet world. Cecelia began training in the Bay Area with Tricia Kaye, a student of Willam Christensen at the University of Utah. She continued her ballet training at the School of American Ballet and the University of North Carolina School of the Arts.

After receiving a master's degree in ballet from Indiana University, Cecelia embarked on a rewarding career in ballet that proved as diverse as San Francisco Ballet's repertory. Cecelia found great satisfaction in sharing her love of ballet through teaching. For years, she taught adult students at various institutions across the country including Mills College, Indiana University and in her own studio in the Oakland Hills.

Cecelia Beam teaching San Francisco Ballet School's Dance Class for People Living with Parkinson's Disease.

© Chris Hardy

In addition to her long career as a ballet teacher, Cecelia served in an administrative position with the SF Ballet Human Resources department for 20 years. "It has been a privilege to work with SF Ballet for over two decades and an honor to have received many opportunities throughout my career," Cecelia mused.

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# NO TIME LIKE THE PRESENT

San Francisco Ballet in  
Ratmansky's *Russian Seasons*.  
© Erik Tomasson

When it comes to creating or updating your estate plans, the sooner you take action to complete your plans, the sooner you will be able to feel confident that you have secured the future of those you care about.

Estate planning tools, such as a will or living trust, should reflect your ongoing desires about the distribution of your property. Many have found making provisions for charity in their wills or living trusts is a meaningful experience. Careful planning can help you make charitable gifts without impacting the future security of your loved ones.

There are many ways to include favorite charities, such as SF Ballet, in your plans after taking care of family and others. A gift through your will or trust can be a flexible way to make future gifts. You may choose to give:

- ▶ A specific sum.
- ▶ A percentage of your estate.
- ▶ What remains after you have provided for family and friends.

These are just a few of the ways to make a “gift of a lifetime” to SF Ballet. We are happy to discuss other options for giving or provide you and your advisors with more information. Simply contact us.

## A NOTE OF SINCERE THANKS

We want to thank you for all you have done for San Francisco Ballet in the past. Your generosity has enabled us to share the joy of dance with the widest possible audience.

We want to acknowledge the members of the Jocelyn Vollmar Legacy Circle and all those who have supported San Francisco Ballet through ticket donations and contributions. In the days, weeks and months ahead, support for both the SF Ballet Association and the SF Ballet Endowment Foundation will be more important than ever as they serve their most fundamental purpose – assuring the Ballet’s future. Because of the commitment and foresight of those who have contributed, SF Ballet will be able to weather the current crisis.

# DON'T LET YOUR GIFT BE "LOST"!

Naming SF Ballet as a beneficiary of an insurance policy or the remainder of a retirement plan is a great way to leave a legacy, but to be sure your wishes are carried out, please give us the information we will need to actually receive your gift.

To claim funds from retirement plans, insurance policies, financial accounts and other assets that are not part of a trust or included in probate, SF Ballet (and any beneficiary) must know the name of the company or plan administrator, and it is helpful to have contact information and the policy or account number.

Providing us with a copy of the "designation of beneficiary form" you sent to your plan administrator would also be very helpful if we have to prove we are entitled to receive the distribution. This is not always easy! If we are unaware of your plans, we might never receive the gift you intended!

And, please advise SF Ballet how you would like your gift to be used. The more information we have about your plans, the more likely we will be able to carry them out as you request.

Of course, we will keep the information confidential and respect your wishes if you would like to remain anonymous.

## ALL ABOUT BALLET

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"My evolving responsibilities are fun and challenging. I continue to hold the Company in the highest regard. With its strong leadership, SF Ballet is uniquely positioned to showcase incredible classical and contemporary ballet and to do all of it extraordinarily well."

Now retired from SF Ballet administration, Cecelia maintains a busy teaching schedule in the Adult Ballet Program at SF Ballet School, including a class for people living with Parkinson's disease. Cecelia developed the course for SF Ballet after training at the Dance for PD® program affiliated with the Mark Morris Dance Group. The course incorporates movements and dances inspired by classical ballet technique and the SF Ballet

repertory. She also leads Dances at a Distance, a new SF Ballet class for seniors sheltering in place. The virtual course recently launched with great success.

Cecelia's passion is conveyed through her ongoing contributions to the ballet community and further demonstrated by her decision to include a gift to SF Ballet in her estate. "SF Ballet has been very meaningful to me on many levels. As a San Franciscan and a lover of the art form, it made perfect sense to include the organization as a beneficiary of a percentage of my estate. I want to ensure the future at SF Ballet is bright, and the organization continues to touch and inspire many generations to come."

## ARE YOUR PLANS UP TO DATE?

Take this short quiz to see if you need to add reviewing your estate plans to your “to do” list.

Since I last reviewed my plans:

1. I have not retired.  True  False
2. My marital status has not changed.  True  False
3. I have not had a significant increase or decrease in wealth.  True  False
4. No children or grandchildren have been born.  True  False
5. My friends and the charities I care about are remembered as I wish in my plans.  True  False

This quiz is easy to score; all true answers indicate your plans are likely up to date. If you answered false to any question, you may want to take another look at your current plans and make sure they still reflect your wishes.

We will be happy to answer any questions you may have about the benefits of including charitable gifts as part of your plans.

San Francisco Ballet in  
Possokhov's *Classical Symphony*.

© Erik Tomasson



## FOR MORE INFORMATION, PLEASE CONTACT:

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Sasha De Sola and Tiit Helimets in the  
finale from Balanchine's *Diamonds*.

© Erik Tomasson





SAN FRANCISCO BALLET  
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## IF YOU HAVE A DONOR ADVISED FUND...

Donor advised funds (DAF) are a great way to give, allowing you to make charitable gifts to those organizations you care about most at the time you choose, often with expert advice and assistance.

If you have a donor advised fund, have you considered what will happen to the funds in the future when you are no longer there to make decisions about disposition of funds?

Designating SF Ballet to receive a distribution from a terminating DAF or to be a beneficiary of endowment distributions is a wonderful way to make a “bequest” without affecting other estate plans.

