

ENSURE THE FUTURE OF DANCE AT SAN FRANCISCO BALLET



San Francisco Ballet in Scarlett's *Hummingbird*. © Erik Tomasson

FROM DANCER TO DONOR

Lynda Meyer Cronin has devoted much of her life to ballet, specifically to San Francisco Ballet. Her involvement with SF Ballet started when she was a teen. “My parents encouraged me to participate in a summer session at SF Ballet, and it took off from there,” she said. “The turning point was when I was offered a scholarship.”

Lynda danced with SF Ballet for 20 years before teaching for nine years at SF Ballet School. “When you start as a young person in the ballet world, the people you often spend the most time with are your ballet peers,” Lynda says. “SF Ballet was my extended family. It was wonderful to be a part of that environment and it contributed to my success.”

Because she strongly believes that SF Ballet is a community treasure, Lynda has made a contribution of her own: a gift to the Ballet in her estate plans. “My

late husband Tom and I did not have any children, so we decided to select a few charitable organizations to benefit from our estate,” Lynda explains. “We have made a gift to SF Ballet in our trust to support scholarships for girls, much like the one I received. We hope to help other young women realize their ballet dreams. This is my way of doing that.”

Lynda Meyer as the Sugar Plum Fairy in Lew Christensen's *Nutcracker*, 1967.

© San Francisco Ballet. Photo courtesy SFMPD.





A GIFT THAT KEEPS GIVING

A growing number of donors are supporting San Francisco Ballet's long-term needs by making gifts to the San Francisco Ballet Endowment Foundation. Here are some answers to frequently asked questions about endowment giving.

Q. What is an endowment?

A. Endowments provide important long-term support to charitable organizations, just like an individual's savings or investments provide a degree of security. The Endowment Foundation is a permanent and stable source of support for the Ballet.

Q. How does an endowment gift work?

A. The original value of gifts to the Endowment Foundation is kept intact. Only a specific percentage of the Endowment Foundation's value is distributed annually, ensuring that the spending power of gifts to the Foundation is maintained in perpetuity.

Q. How can I make an endowment gift?

A. Endowments can be established with:

- ▶ an outright lifetime gift;
- ▶ a deferred gift, such as a bequest through a will or trust;
- ▶ a combination of both, such as an outright gift that is augmented with a bequest.

An easy and economical way to make an endowment gift is by donating a life insurance policy that is no longer needed for its original purpose. Superfluous life insurance policies are excellent sources of gifts to the Endowment Foundation because they do not "cost" the donor anything but may result in a significant income tax deduction.

Or, you may find that designating the remainder of a retirement plan is an ideal way to make a gift to the Endowment Foundation. You may designate that any assets left in the account are distributed to SF Ballet, while retaining access to and control over the account during your lifetime.

The residuum of charitable remainder trusts and other planned giving arrangements may also be designated for the Endowment Foundation.

Gifts of property, such as securities or real estate, are usually deductible at their full value, regardless of what you paid for the asset. The gift qualifies for an income tax deduction, and no capital gains tax will be due on the appreciation.

We would be happy to provide further information to you and your advisors about how to make a gift to the San Francisco Ballet Endowment Foundation.

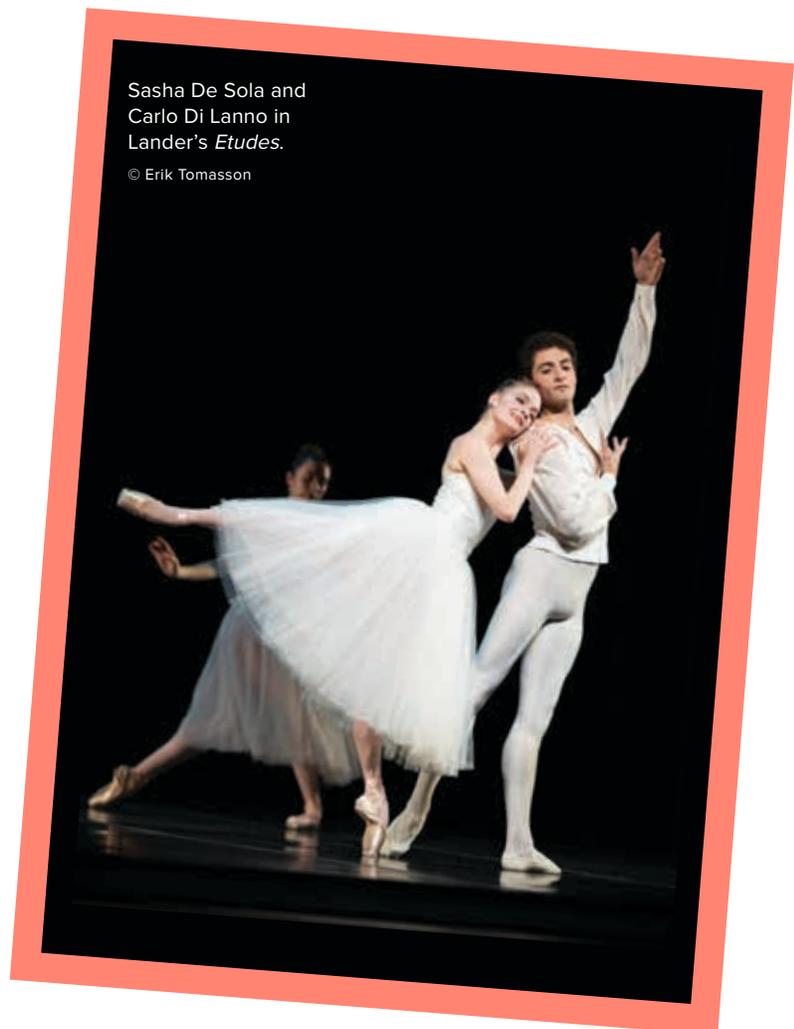
THE MANY BENEFITS OF A GIFT ANNUITY

If you want to make a gift and also increase your income, consider a gift annuity.

Like many people, you may want to avoid the risks of reduced income or a decline in the value of your portfolio due to a flat economy, low interest rates, stock market readjustments and other unpredictable economic factors. With a charitable gift annuity, you can not only enhance your future economic security, but you may also be able to make a larger gift to SF Ballet than you thought possible.

Charitable gift annuities provide fixed, dependable payments that will continue for as long as you and/or your spouse or another person live. Because a portion of the assets used to create your gift annuity will eventually be used for charitable purposes, you will benefit from an income tax deduction and your income distributions may be taxed at more favorable rates than other income. You will also enjoy the satisfaction of knowing you have arranged for an eventual gift in support of SF Ballet.

Payment rates for gift annuities are based on the number and ages of the person(s) receiving the payments, and other actuarial factors. Once the amount of regular payments is set it will never change.



You can create a charitable gift annuity by transferring assets such as cash or stocks to SF Ballet and completing a simple agreement. In return, you and/or someone you choose will receive payments for life.

Establishing a charitable gift annuity is quick and easy, but the benefits to you, your loved ones and the Ballet will last a lifetime.

Return the enclosed card to receive more information about a gift annuity, in complete confidence and with no obligation.

THREE THINGS TO REMEMBER ABOUT ESTATE PLANNING

- 1. Make a Will.** Unless you have a valid will or documents such as a living trust in place, someone not of your choosing will have to handle your estate and decide who will manage your affairs if you are unable to do so. And, in the absence of your own plans, state law may require distribution of your property to your nearest relatives, regardless of your wishes.
- 2. Review and Update Your Plans Periodically.** Having a will, trust or other plans that reflect your current wishes is vitally important. Changes in your family (marriages, births, deaths, etc.), differences in the value of your property or how it is owned, changes in state and federal tax laws, or a move to another state may all make your plans obsolete.
- 3. Review Other Assets.** Don't forget about life insurance or retirement plan assets when thinking about your long-range plans. The beneficiary designations you made in the past may not reflect your current wishes. Be sure to review them as part of your overall planning, keeping in mind you can name a charitable organization as a beneficiary if you wish.



San Francisco Ballet
in Welch's *Bespoke*.

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FOR MORE INFORMATION, PLEASE CONTACT:

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Mathilde Froustey
and Tiit Helimets in
Tomasson's *7 For Eight*.

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THE IRA ROLLOVER – A GREAT WAY TO GIVE TO SF BALLET

Whether or not you will be itemizing deductions this year, you can realize important benefits by making your charitable gifts from your IRA. Anyone 70½ or older may donate up to \$100,000 per year to one or more charitable organizations and count the contributions towards their required minimum distribution. Gifts made directly from an IRA to a qualified charity will not be included in your adjusted gross income, which may keep you in a lower tax bracket and help you avoid Medicare supplemental charges and limits on certain tax deductions or benefits.

