



Making a Planned Gift

Thank you for your support of San Francisco Ballet. There are two ways to name San Francisco Ballet in your plans, regardless of whether your gift is through your will, a charitable trust, or another type of document. The following information explains how to designate your planned gift to make sure it goes to its intended purpose.

Choosing Where to Designate Your Gift

Option 1: San Francisco Ballet Association

To provide SF Ballet with the flexibility to determine allocation of your contribution, you can leave your gift to San Francisco Ballet Association. Gifts left to the Association may be invested to generate income or used in the year they are received. This allows SF Ballet to decide how your gift can best be used to support our mission.

Tax ID: 94-1415298

Option 2: San Francisco Ballet Endowment Foundation

If you want to ensure that the principal of your gift will be held in perpetuity, you can leave your gift to San Francisco Ballet Endowment Foundation. This means that your gift will be added to the endowment and only the income and interest from your gift may be used to support SF Ballet, as determined by Endowment Foundation policies.

Tax ID: 94-2747262

Sample Language for Inclusion in Your Bequest

Whether your gift is for the Association or the Endowment Foundation, you may designate it for San Francisco Ballet's general purposes so that it can be used where most needed, or you may designate it to support a particular need such as new works, San Francisco Ballet School, touring, or community education and outreach programs. San Francisco Ballet's planned giving office will work with you and your advisors to create language expressing your specific wishes, or you may adapt the following sample language when creating your plans.

I give \$_____ [or __% of my estate/trust] to San Francisco Ballet Association [or San Francisco Ballet Endowment Foundation]. It is my preference that my gift be used for _____ [e.g., general purposes, new works, touring, etc.]. If my gift cannot be used in accordance with my stated preference, then San Francisco Ballet may use my gift in a manner that most nearly accomplishes my wishes.

Contact Us

However you may choose to leave your gift to San Francisco Ballet, you will be making an important contribution to the future of dance. If you have any questions or need assistance, please contact:

Kristin Bertrand
Campaign Director and Acting Director of Philanthropy
415-865-6627 | legacycircle@sfballet.org



Letter of Intent for an Estate Gift to San Francisco Ballet

I/We wish to support the future well-being of San Francisco Ballet through a planned gift, and with this letter we are informing the Ballet of my/our plans. I/We have made a provision of this legacy gift for the San Francisco Ballet through a:

- ☐ Charitable bequest in a will or living trust
- ☐ Individual Retirement Plan (IRA)
- ☐ Life insurance designation
- ☐ Charitable Remainder Trust
- ☐ Charitable Gift Annuity
- ☐ Other
- ☐ Copy or excerpt of document enclosed (optional).

I/We wish to inform the Ballet for its long-term planning purposes that the current value of my/our future gift is \$_____ (if a percentage of the estate, please state the approximate value) to the San Francisco Ballet Association ☐ / San Francisco Ballet Endowment Foundation ☐ (please select one option). I/We understand that providing this information is completely at our discretion and will be kept in strict confidence. I/We acknowledge that stating an amount does not mean my/our estate is legally bound by this statement. I/We understand that there is no requirement to disclose, as a condition of membership in the Jocelyn Vollmar Legacy Circle (JVLC), but that doing so will help SF Ballet better plan for its future. For future reference, this is the contact information of my executor and/or plan administrator:

Name

Company

Phone

Email

To encourage others to support San Francisco Ballet I/we agree to be recognized as members of the Jocelyn Vollmar Legacy Circle in donor listings. I/We acknowledge that only members of the JVLC who give permission will have their names published in Repertory Season program books.

- ☐ I/We give permission for my name(s) to be published as follows:

(Please print name(s) as it should appear in the Legacy listing.)

- ☐ I/We prefer to keep my/our membership in the Jocelyn Vollmar Legacy Circle confidential. Please do not publish my/our name(s).

I/We would prefer invitations to JVLC events, such as the annual Legacy Luncheon, to be sent to the following email address: _____.

Name

Signature

Date

Address

City, State, Zip