

Music in the Vineyards Virtuoso Society

Make A **Bequest or Estate Plan Gift To**
Music in the Vineyards' **Virtuoso Society**



MAKE A BEQUEST OR ESTATE PLAN GIFT TO

Music in the Vineyards' Virtuoso Society

A bequest is a gift from your estate — it could be cash, securities or other assets — made through your estate plan. A bequest costs nothing now and allows you to contribute to **Music in the Vineyards** far into the future.

You can make a bequest to Music in the Vineyards by including language in your will or living trust. You can also designate Music in the Vineyards as a beneficiary of your life insurance policy or retirement account.

There are several advantages to creating a bequest from your estate to Music in the Vineyards:

- Gifts to Music in the Vineyards from your estate are currently exempt from federal estate taxes
- A bequest has no cost to you now while giving you satisfaction that you have made a significant contribution to Music in the Vineyards' future
- A bequest is flexible and can be modified if your circumstances change

- Major gifts to Music in the Vineyards can provide naming opportunities where your gift demonstrates leadership and support for a key program or purpose
- If you advise Music in the Vineyards of your gift, you will be acknowledged and recognized as a member of The Virtuoso Society. An Enrollment Form for The Virtuoso Society, is included here.

The advantages of your legacy gift or bequest to Music in the Vineyards are significant. These gifts provide us with financial resources in future years to continue our mission of a live chamber music festival in Napa Valley.

Members are acknowledged annually in the Festival's summer program and are also invited to a private event each year. For further information call 707.258.5559.



Bequests to Music in the Vineyards

A bequest to Music in the Vineyards can be made for a specific dollar amount, or as a percentage of your estate, or as a percentage of an asset in your estate, for example: “ ___% of my liquid assets shall go to Music in the Vineyards.”

When planning a bequest, you should consider how you would like your gift to be used, whether it be unrestricted in purpose, or restricted to a specific purpose or program.

Unrestricted Bequest

An unrestricted bequest allows Music in the Vineyards to determine how to use any gift proceeds. Unrestricted gifts are important because they provide us with flexibility in meeting unknown future needs.

Restricted Bequest

A restricted bequest directs gift proceeds to a specific program or purpose. Some of these are listed below for your consideration. If you have ideas about a restricted gift, it would be advisable to discuss your ideas with someone in our organization to develop the appropriate language for your bequest:

- Annual underwriting of a concert each season
- Annual underwriting of our Fellowship Quartet program
- Annual underwriting of a visiting musician or quartet
- Education and Outreach Programs
- New music commissions
- Piano maintenance

Music in the Vineyards as Beneficiary

You can designate Music in the Vineyards as a beneficiary of a life insurance policy or retirement plan. To do so, contact your life insurance agent or the retirement plan administrator and request a Change in Beneficiary form which you will then complete and return. As with a bequest, you can specify a specific purpose or use for the beneficiary proceeds by providing a separate letter describing your intentions.

We hope that you will consider one of these options to become a member of our Virtuoso Society and a contributor to the future of Music in the Vineyards here in the Napa Valley. Please feel free to talk to us if you have any questions about making a legacy gift to our organization.

A sample of bequest language would be: “I hereby give _____ to Music in the Vineyards, a performing arts organization, taxpayer identification 68-0358441, located at 1020 Clinton St #201, Napa, CA 94559. This gift is (choose one) unrestricted and will used for general purposes; or restricted to the following purposes: _____.”

Disclaimer: If you are considering a legacy gift to Music in the Vineyards, you should consult with your financial, legal and tax professionals to determine any specific consequences to you and your estate.

Music in the Vineyards' Virtuoso Society

Thank you for your interest in making a future gift to Music in the Vineyards.
The information in this form is not offered as legal or tax advice.
Please consult your attorney or tax advisor for advice in your estate planning.

NAME

ADDRESS

EMAIL ADDRESS

PHONE NUMBER

Legacy Gift: It is my/our pleasure to inform you that I/We want to support the future well-being of Music in the Vineyards through a legacy gift and have made a provision for this gift in the following manner:

- Charitable Gift in a will or trust named
- Individual Retirement Account named
- Donor-advised fund beneficiary designation named
- Life Insurance policy designation named
- Charitable Remainder Trust named
- Charitable Gift annuity named
- Gift of an asset described as
- Other described as

How will the legacy gift be valued?
(It is common to provide a percentage of an asset, or a specific dollar amount).

Recognition: Would you like to be recognized (without any dollar amount) for your legacy gift, or would you like to remain anonymous?

Do you have intentions for the legacy gift?

- Unrestricted
- Restricted to: (Examples: New Commissions, Scholarships)

Thank you for becoming part of the future of Music in the Vineyards!

Tax identification # 68-0358441

Please return this form to

Music in the Vineyards, P.O. Box 6297, Napa, CA 94581

For further information look at our website, musicinthevineyards.org
or contact the Music in the Vineyards Executive Director, at 707.258.5559,
info@musicinthevineyards.org



music
in the
vineyards

P.O. Box 6297, Napa, CA 94581

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“Please meet with your financial advisors and discuss how you can donate to MITV today and in the future! I have done this. It’s the least we can do for all the beauty MITV has brought into our lives. It truly is a rewarding feeling.”

—Maritza Nelson, MITV Supporter

