

Create A Musical Legacy Via Encore Society

Your gift ensures that IPO will have perpetual support to present outstanding orchestral concerts, deliver opportunities for youth to experience life-changing live music experiences and foster wide-reaching artistic community engagement activities.



Ensuring IPO's Future

“As an educator, I know that music is truly a universal language crossing all barriers. I have had the experience of observing children’s wonder and joy as they watched and listened to IPO’s orchestral performances. I have also followed the development of IPO as it progressed from an enthusiastic community musical group to a highly polished and professional orchestra. Since this orchestra has greatly enriched my life, it gives me some comfort in knowing—in a small way—I can bring that enrichment to a future generation after I am gone.”

– Marilyn Tannebaum, Charter Encore Society member

Top Myths About Planned Giving

MYTH: Planned giving is only for the very wealthy.

TRUTH: Anyone who accumulates appreciable assets during their lifetime can make meaningful planned gifts to their favorite non-profits—during their lifetime and/or upon their passing.

MYTH: Planned giving is usually very complex.

TRUTH: A planned gift can be as simple as a bequest in a will or a beneficiary designation of an individual retirement account.

MYTH: A planned charitable gift substantially depletes what is left for my heirs.

TRUTH: You can make a meaningful, lasting contribution to IPO that also provides your heirs with the bulk of your estate.

MYTH: Planned giving involves substantial legal fees.

TRUTH: IPO provides suggested bequest language, which can be used ‘as is’ or woven into your will or estate plan by legal counsel.

MYTH: Planned gifts can only benefit IPO when I pass away.

TRUTH: Planned giving can include gifts made over your lifetime, such as a charitable gift annuity or a charitable remainder trust.

MYTH: When I make a planned gift, I have no control over how that gift is used.

TRUTH: You may designate how your planned gift is used, if you wish, through a gift agreement or by making special conditions in your will or trust provision—and you can provide for individuals you designate to monitor the use of the gift in perpetuity.

MYTH: Planned gifts only include cash or marketable securities.

TRUTH: Planned gifts may also include non-cash gifts, such as real estate, closely-held business interests and art collections. Any appreciable asset can be included in planned giving.

MYTH: Planned gifts will not allow me or my family to retain some lifetime economic benefit.

TRUTH: There are several planned giving tools—like charitable gift annuities, charitable remainder trusts, retained life interests and charitable lead trusts—that allow you and your family to retain lifetime economic benefits.



Your Musical Legacy



What is Encore Society?

The Encore Society of Illinois Philharmonic Orchestra (IPO) is comprised of individuals who have included IPO in their estate plan. Encore Society members are recognized in our program books, receive a custom-designed pin that denotes their support of IPO, and are invited to an exclusive, annual event.

IPO's role is to receive, administer and provide ongoing stewardship of your planned gift to ensure that your intentions are honored, and we strive to give each donor maximum flexibility and privacy in connection with their own estate plans.

A charitable bequest to the Encore Society can also help you and your heirs save estate taxes by providing your estate with a charitable deduction for the value of the gift. Because there are many ways to make a legacy gift, we urge you to consult with



Your Musical Legacy

- **Name IPO in your will** (bequest) to receive a percentage or fixed amount of your remaining estate.
- **Name IPO as owner or beneficiary** of your retirement instrument or life insurance policy (existing or new policies).
- **Create a Donor Advised Fund**—essentially, a charitable investment account with investments managed by IPO or other third-party, allowing you and your heirs to make grants to IPO over time.
- **Establish a Charitable Lead Trust** to provide IPO with financial support for a period of time, with the remaining assets going to your family members or other beneficiaries.
- **Set up a Charitable Remainder Trust**, so that you and your beneficiaries can receive life income payments, while making a future provision for IPO.
- **Start a Charitable Gift Annuity**, whereby you transfer cash or property to IPO in exchange for a partial tax deduction and a lifetime stream of annual income from IPO.



What if I've Already Included IPO in My Estate Plans?

If you've already included IPO in your estate plans, thank you—and welcome to the Encore Society! Please let us know of your intentions using the form on the next page, so that we can recognize your legacy gift.

How Do I Get More Information About Encore Society?

For more information about how you can make a planned gift to IPO, please contact IPO at 708-481-7774, OR complete the form below and mail it to Illinois Philharmonic Orchestra, Attn: Encore Society, 377 Artists Walk, Park Forest, IL 60466.

Name(s) _____

Address _____

City _____ State _____ Zip _____

Preferred Telephone Number _____

Email _____

- ☐ Please contact me with more information about making a planned gift to IPO
- ☐ I have included IPO in my estate plan (gifts of all sizes are greatly appreciated)
- ☐ I prefer to remain anonymous

Encore Society gifts will be treated as a General Operating gift unless otherwise specifically directed by the donor.

☐ Direct my gift to _____

If you are leaving the proceeds of an insurance policy or IRA assets to Illinois Philharmonic Orchestra, please be sure to contact the administration of your account for a change of beneficiary form, or simply download the form from your provider's website. This completed form will determine where your asset is directed.

Our legal name is Illinois Philharmonic Orchestra, and our Tax ID# is 36-3293300.

We sincerely thank you for your dedication to—and support of—IPO, and for leaving a legacy in music!