

Beethoven Legacy Circle Information Card

"I want to seize fate by the throat."

Ludwig van Beethoven in a Letter to Dr. Franz Wegeler
November 16, 1801

- I've already included RSO in my estate plan through:
 - my will
 - a trust arrangement
 - an insurance policy
 - other _____

- As a visionary, I would like to be listed as a member of the Beethoven Legacy Circle to encourage others to do the same.

Please list my/our name as follows

- At the appropriate time, the RSO will be contacted by my legal counsel or a family member:

Name: _____

Address: _____

Phone: _____

- Please contact me regarding additional information on Planned Giving and leaving a legacy for the RSO:

Name: _____

Address: _____

Phone: _____

This information will be kept private and confidential except for listing your name if you have permission above.

(Reverse of Information card)

CHOOSE THE RIGHT GIFT TO MATCH YOUR PLANNED GIVING AND ESTATE PLANNING GOALS

| If Your Goal is to: | Then You Can: | And Your Benefits Are: |
|---|---|--|
| Make a simple and easy gift to The Reading Symphony Orchestra | Just write a check made payable to the Reading Symphony Orchestra | An income tax deduction and an immediate impact for RSO |
| Avoid capital gains tax | Contribute appreciated stocks or bonds held more than one year | Income tax deduction and zero capital gains tax on the asset gifted |
| Make a large gift with little cost | Contribute a life insurance policy you no longer need | Current and possible future income tax deductions |
| Secure a lifetime income stream and create a hedge against inflation over the long term | Create a charitable remainder unitrust | A variable income for life and tax benefits |
| Secure a fixed life income while avoiding market risks | Establish a charitable gift annuity or annuity trust | Tax benefits and often a higher rate of return than other assets |
| Defer a gift until after your death | Put a bequest in your will or living trust (cash, specific property, or a share of the residue) | Estate tax deduction and keep assets in your name during your lifetime |
| Maximize heir's inheritance while benefiting RSO | Name RSCO as beneficiary of your retirement plan, leave other assets to family | Reduced estate and income tax |

