



MINNESOTA
ORCHESTRA

The Musical Legacy

A Charitable Estate and Financial Planning Guide for Minnesota Orchestra Patrons | Spring 2016

Celebrating Our World-Class Orchestra

“In the Minnesota Orchestra’s triumphant return to Carnegie Hall last Thursday, Vänskä ploughed the fascinating terrain of Sibelius with the grace of a master who knows an elemental truth: sometimes the strongest gesture is a whisper.”

Bruce Hodges, MusicalAmerica.com, March 7, 2016

“For the sake of New York’s music lovers—and the sake of Sibelius—the hall should invite this orchestra back, and soon.”

Zachary Woolfe, The New York Times, March 4, 2016

We are so lucky to have this extraordinary, world-class orchestra right here in the Twin Cities! After a thrilling experience at Carnegie Hall in New York in March, the Orchestra is now preparing for a European tour at the end of August. In addition, a short tour in Florida is scheduled for January 2017. Our own Minnesota Orchestra is in demand across the globe and we have the privilege of experiencing it right here at home.

Energy is high this spring as we celebrate the many triumphs of the Minnesota Orchestra. We started the year with the very successful Beethoven Marathon. Audiences were enthusiastic—leaping out of their seats to applaud the stellar performances—and nearly all of the concerts were sold out. That is no small feat during the frigid month of January!

Also in January, we celebrated seven young emerging composers at our Composer Institute program. After an intense week of workshops, rehearsals and sessions with Osmo Vänskä and Minnesota Orchestra musicians and staff, audiences were treated to a full-scale performance of seven



Osmo Vänskä and the Minnesota Orchestra musicians performed at Carnegie Hall in New York City in March.

new extraordinary symphonic works of art. In addition, our innovative Young People’s Concerts have been extremely well attended. What a joy to see the delight in all these young faces as they enjoy the music, many of them discovering live classical music for the first time.

As we celebrate our successes this year, we are also investing in the future of orchestral music with new audiences and new talent. We are looking toward the future with great hope and ambition. We depend on the community around us to help make this investment as well. **As you think about your own future and your own legacy, please consider investing in the Minnesota Orchestra by including us in your estate plan.** The Orchestra needs your support to continue this level of excellence for all generations to enjoy. We are thrilled with the enthusiastic support of this community and the palpable love for our great orchestra. Thank you for helping the Minnesota Orchestra be the best it can be—now and into the future.



To learn more about making a lasting gift to support the Minnesota Orchestra, please contact Emily Boigenzahn at (612) 371-7138 or visit minnesotaorchestra.mylegacygift.org.

9 Easy Ways to Build a Strong Estate Plan

Taking the time to create an estate plan can help you decide how to distribute the hard-earned resources you have accumulated throughout your lifetime. Follow this framework to build a plan that achieves your personal and charitable goals and recognizes the people and causes you cherish most.

1 Determine which people and charities should receive your assets and whether the gifts should be made outright or in a trust. Contact us to learn about the variety of ways to remember us in your estate plan.

2 Select a trusted family member, friend or responsible party—such as a bank or trust company—to administer your estate, which includes following the instructions in your will and distributing assets.

3 Prepare an advanced directive (also known as a health care power of attorney) to indicate who should make health care decisions on your behalf if you are unable to do so. You should also decide if you want a living will, which directs that no extraordinary

life-sustaining medical procedures shall be used to prolong life when it is medically determined that no hope of recovery remains.

4 Outline your funeral plans, including the names of people you want to be notified after your passing.

5 Calculate your net worth and list all of your financial assets, including bank account numbers, insurance policies and retirement plan assets.

6 Compile a list of all of your personal data, including Social Security number, date of birth and digital information, such as online accounts, user names and passwords.

7 Record the locations of important documents, such as your vehicle title, marriage certificate, copies of prior years' tax returns, as well as the name of your accountant and estate planning attorney.

8 Ensure that your will is available outside of your safe-deposit box, which in some states can be closed when you die and not immediately accessible.

9 Consult an estate planning attorney or tax advisor for assistance as you develop your plan.

” *If you are considering naming us in your will as you make or update your estate plan, please let us know so we can ensure your gift is used as you intended.*

START YOUR GIVING JOURNEY TODAY



Estate planning provides an opportunity for you to create an outline for the future that your loved ones feel good about. Our FREE guide **Your Personal Planning Road Map** breaks the planning journey into simple steps. Simply return the enclosed survey to request your copy today.





A Simple Way to Show You Care

A will or living trust allows you to protect your loved ones long after your lifetime. But these documents also give you the power to provide the causes you care deeply about with the vital resources they need to thrive.

Here are a few basic facts about using your will or trust to make a lasting connection to our organization:

How to Make Your Gift

Including us in your will or trust is an easy process. Start by contacting us to request official wording for your gift. Then ask your estate planning attorney to use this language when you create your will or trust. If you already have a will or trust, simply ask your attorney to revise or amend the existing document.

Your Benefits

- **It's worry-free.** You won't give anything away until after your passing, so you can keep using your possessions and resources during your lifetime.
- **You have choices.** You can give a specific item, an amount of money, a gift contingent upon certain events or a percentage of your estate to us.



Transform the Lives of Others

If you have already included us in your will or trust, please let us know so that we can properly thank you. If you're ready to make a gift, we're here to help answer any questions you may have. The impact you can have is priceless.



Our Young People's Concerts host children of all ages, many of whom are discovering live classical music for the first time.

The Laureate Society

Honoring Those Who Are Committed to the Minnesota Orchestra's Future

The Laureate Society was established to recognize and express appreciation to those individuals who have remembered the Minnesota Orchestral Association in their estate plans through wills, living trusts or other deferred gift vehicles.

Benefits of Laureate Society membership:

- Invitation to annual Laureate Society event with Minnesota Orchestra musicians
- Invitation to an open rehearsal
- Backstage tour of Orchestra Hall
- Recognition in Laureate Society roster
- Special invitations to Orchestra events
- VIP ticketing services for Laureates who also donate to the Guaranty Fund

Members of the Laureate Society may remain anonymous, and all information is kept strictly confidential. There is no minimum commitment required for membership.



To join the Laureate Society, please contact us at **(612) 371-7138** or visit minnesotaorchestra.mylegacygift.org/laureate-society.

3 Quick Actions to Take



STEP 1 **Return** the enclosed survey to request the complimentary estate planning guide **Your Personal Planning Road Map**.

STEP 2 **Contact us** to learn how your gift can lead the way for the people we serve.

STEP 3 **Meet** with your estate planning attorney for assistance creating your plan.



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