



**HoustonBallet**  
THE ARABESQUE SOCIETY

## LEAVE A **LASTING LEGACY**

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Houston Ballet is one of the nation's most esteemed ballet companies, proudly marking more than half a century of vitality, innovation, and excellence in dance for local audiences and beyond. Planned gifts to Houston Ballet allow the Company to perform world-class ballet, serve as a premier training ground for dance, and create important education and community outreach programs by helping to safeguard its future. The Arabesque Society recognizes those generous friends who have provided for Houston Ballet in their estate plans.

All planned gifts are directed to Houston Ballet's Endowment Fund, to ensure they continue to support the Company in perpetuity. Gifts can be made through a variety of ways, including naming Houston Ballet as a beneficiary in your will, life insurance policy, or retirement plan.

If Houston Ballet has played a role in your past, play a role in its future by remembering the Company in your estate plan. Once you have remembered the people you care about, please consider the Company you believe in.

### **ARABESQUE SOCIETY MEMBERS RECEIVE:**

- **Recognition in Houston Ballet's Program and Annual Report**
- **Invitation to annual Arabesque Society event**
- **Invitations to select Company rehearsals and lectures**
- **Subscription to *Houston Ballet News***



**Legal Name:** Houston Ballet Foundation  
**Tax Identification Number:** 74-1394920  
**Mailing Address:** 601 Preston Street, Houston, TX 77002

#### **WAYS TO GIVE TO LEAVE A LASTING LEGACY:**

##### **1. Include a gift to Houston Ballet in your will or trust.**

**Interested? Suggested next steps:** seek the advice of your financial or legal advisor with this sample language for reference: I hereby direct \$ (or percent of my residual estate or trust) in cash, securities, or other property to the Houston Ballet Foundation for its unrestricted use.

##### **2. Name Houston Ballet as a beneficiary of an IRA, retirement plan, or life insurance policy.**

**Interested? Suggested next steps:** seek the advice of your financial advisor and explore designating Houston Ballet as a beneficiary, typically as follows:

1. Contact your retirement plan administrator, insurance company, bank, or financial institution for a change-of-beneficiary form – or search for it online.
2. Decide what percentage (1 to 100) you would like Houston Ballet to receive and name us, along with the percentage you chose, on the beneficiary form.
3. Return the completed form to your plan administrator, insurance company, bank, or financial institution.

##### **3. Consider an IRA Charitable Rollover, a special opportunity for those 70½ years old and older.**

You can give any amount (up to a maximum of \$100,000) per year from your IRA directly to a qualified charity without having to pay income taxes on the money. You may also see this gift option referred to as a qualified charitable distribution, or QCD for short. Also, beginning in the year you turn 72, you can use your gift to satisfy all or part of your required minimum distribution (RMD).

**Interested? Suggested next steps:** seek the advice of your financial advisor and explore making a distribution online or printing and mailing a distribution letter.

**4. Use your Donor Advised Fund.** You can recommend a grant or recurring grants now to make an immediate impact or use your fund as a tool for future charitable gifts. You can also create a lasting legacy by naming Houston Ballet the beneficiary of the entire account or a percentage of the fund. With a percentage, you can create a family legacy of giving by naming your loved ones as your successor to continue recommending grants to charitable organizations.

**Interested? Suggested next steps:** seek the advice of your financial advisor and contact your fund administrator for a beneficiary form.

**5. Establish a memorial or tribute gift, such as an endowed dancer position or Academy scholarship.** Honor your connection, or that of a loved one, to Houston Ballet in a meaningful way by supporting the work of our mission in perpetuity. Your memorial or tribute gift will be a lasting tribute and will safeguard the Company you love for generations to come.

**Interested? Suggested next steps:** seek the advice of your financial advisor and contact Angie Lane at 713.535.3276 or [alane@houstonballet.org](mailto:alane@houstonballet.org) to discuss funding opportunities.

*As with any decision involving your assets, we urge you to seek the advice of your professional counsel when considering a gift to Houston Ballet.*

*For more information, please contact Angie Lane, Chief Development Officer, at 713.535.3276 or [alane@houstonballet.org](mailto:alane@houstonballet.org). All inquiries are confidential.*

**Letter of Intent**

**I have made a commitment to the future of Houston Ballet by including the organization in my estate plans with the following:**

- Bequest
- Charitable Lead Trust
- Charitable Remainder Trust
- Houston Ballet is a beneficiary of a life insurance policy
- Houston Ballet is a beneficiary of a retirement plan
- Other \_\_\_\_\_

**(Optional) I estimate the value of this commitment to be\*: \$** \_\_\_\_\_

- \$10,000 - \$49,999
- \$50,000 - \$99,999
- \$100,000 - \$249,999
- \$250,000 - \$499,999
- \$500,000 - \$999,999
- \$1,000,000 +

**Planned gifts will benefit the Houston Ballet Endowment Fund**

\* If possible, we are grateful to receive a copy of the page(s) of the document that pertains to this commitment, if applicable.

- I would like to be acknowledged as a member of the Arabesque Society, Houston Ballet's planned giving group. Please list me as follows:

\_\_\_\_\_

- I prefer my gift intention to remain anonymous.

Name of Donor (Printed Name)	Birthdate
Signature	Date
Name of Donor (Printed Name)	Birthdate
Signature	Date
Address	City, State Zip

*All information provided is confidential. As with any decision involving your assets, we urge you to seek the advice of your professional counsel when considering a gift to Houston Ballet.*