

**JOFFREY ★ BALLET**  
CHICAGO

LEAVE A  
LEGACY  
THAT  
INSPIRES

---

**REMEMBER  
THE JOFFREY  
BALLET  
IN YOUR  
ESTATE PLAN**

# SHARE YOUR LOVE OF DANCE WITH FUTURE GENERATIONS

Through world-class performances, exceptional dance training, and impactful arts education programs, the Joffrey has shaped lives and built community in unique and profound ways since 1956.

If dance has made a lasting impression on your life, consider a legacy gift to the art form that has so moved you. Include the Joffrey in your estate plan and play a leading role in our mission to provide shared experiences of beauty, joy, and inspiration for generations to come.

## BENEFITS

- ★ A gift from your estate is a deferred commitment and remains in your control during your lifetime; you can modify your estate plan at any time.
- ★ The Joffrey is a nonprofit tax-exempt organization; assets from your estate can transfer to the Joffrey without being taxed, which can be advantageous for you and your heirs.
- ★ Planning a gift through your will is easy. It gives you the satisfaction of providing for the Joffrey's future, and it costs nothing during your lifetime.
- ★ Become a member of the Joffrey's Star Society when you notify us of any planned gift from your estate. Receive invitations to special events and join others in your shared commitment to the Joffrey. Members can choose to be recognized publicly or remain anonymous.
- ★ For a limited time, when you join the Star Society, a \$1,000 gift will be made to the Joffrey in your honor by Joffrey Director Ron Waters and Women's Board member Ann Waters, as part of their generous Legacy Challenge.

Creating an estate plan ensures that your hard-earned assets go to the people and places you choose.

**You can name the Joffrey in your estate plan in a number of easy ways.**



# WAYS TO GIVE THROUGH YOUR ESTATE PLAN

★ **WILL OR TRUST** | Bequests made through a will or trust allow you to designate how your estate will be distributed.

★ **RETIREMENT PLANS** | A retirement plan, such as 401(k) and IRA, can be a tax-efficient and simple way of including the Joffrey in your estate plan. Designate part or all of your retirement plan to the Joffrey through a beneficiary designation form available from your plan administrator or through your online account.

Most retirement plans are subject to income tax (and possibly estate tax) if the beneficiary is a person. However, a charitable organization that is named as a beneficiary does not pay income or estate tax. This enables you to give the full account value to the Joffrey and leave more favorably taxed assets to your heirs or other beneficiaries.

★ **DONOR-ADVISED FUND** | Designate part or all of the remaining balance of your donor-advised fund to the Joffrey.

★ **LIFE INSURANCE POLICY** | You can ask your provider to change the beneficiary of your policy and designate the Joffrey. You continue to own and control the policy but you will not receive an income-tax deduction because the designation to the Joffrey would be revocable.

## HOW TO INCLUDE THE JOFFREY

If you would like to include the Joffrey in your estate plan, you will need our legal name, The Joffrey Ballet; our legal address, 10 East Randolph Street, Chicago, Illinois, 60601; and our tax identification number, 36-4009741.

# JOIN THE STAR SOCIETY

The Star Society recognizes those who have made a provision for the Joffrey in their estate plans. If you have already named the Joffrey in your estate plan, please let us know so we may thank you, welcome you as a member of the Star Society, and invite you to our annual luncheon and other appreciation events.

---

“I first saw the Joffrey when I was a teenage dance student in 1972 — it was **pure magic** and I was hooked for life. What I have learned about the arts, and dance in particular, is that it all has the power to **connect us in an unspoken yet powerful language**, which is not only invaluable, but irreplaceable. My husband, Rich, and I have included the Joffrey in our estate plans to ensure that our experiences can be passed on to future dance artists and audiences alike. I simply cannot imagine a world devoid of classical ballet and dance.”

— **ANDREA WINSHIP**  
Star Society Member

# WE'RE HERE TO HELP

Contact our planned giving office for information on how estate planning can benefit you and The Joffrey Ballet. We would love to help you achieve your philanthropic goals and leave a legacy that is most meaningful to you.



**LAUREN GARDIER**

**Associate Director of Major Gifts**

312.386.8916

lgardier@joffrey.org

## LEGAL INFORMATION FOR YOUR LEGACY GIFT

★ **NAME** The Joffrey Ballet

★ **ADDRESS** 10 East Randolph Street, Chicago, Illinois, 60601

★ **TAX ID** 36-4009741

The material in this brochure is not offered as legal or tax advice. Please consult with your professional advisors prior to any gift.

[JOFFREY.ORG/PLANNEDGIVING](https://www.joffrey.org/plannedgiving)

The Elizabeth Morse Charitable Trust is the generous sponsor of The Joffrey Ballet's Office of Planned Giving.