

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 the Joffrey has made a lasting impression on your life, consider leaving a gift to the Company that has moved and inspired you. Leaving a legacy gift ensures that the Joffrey will continue dancing far into the future, illuminating the lives of audiences and students with the transformative power of dance.

BENEFITS

- ★ You can designate your legacy gift to the area that is most meaningful to you or allow the Joffrey to direct it to the area where it's needed most.
- ★ 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.
- ★ Making an estate gift gives you the satisfaction of providing for the Joffrey's future, and costs nothing during your lifetime.
- ★ 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.
- ★ 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.

WE'RE HERE TO HELP

Contact our team 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.



KRISTEN BIGHAM
Director of Major & Planned Gifts
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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/STARSOCIETY](https://joffrey.org/starsociety)

Cover: Joffrey Company Artists Amanda Assucena and Alberto Velazquez in *Birthday Variations*. Photo by Cheryl Mann.
Inside left: Joffrey Company Artist Jeraldine Mendoza and ensemble in *The Times Are Racing*. Photo by Cheryl Mann.
Inside middle: Photo by Carolyn McCabe.

JOFFREY ★ BALLET
CHICAGO

LEAVE A
LEGACY
THAT
INSPIRES



PLAY A LEADING ROLE IN
SHAPING THE JOFFREY'S
VIBRANT FUTURE.

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** | Among the most popular ways to leave a legacy gift. You may choose to gift a percentage of your estate or a specific dollar amount.

★ **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 gift 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 designate the Joffrey as the beneficiary for any percentage of your life insurance policy. Beneficiary designations are revocable at any time should your situation or financial priorities change.



JOIN THE STAR SOCIETY

The *Star Society* is a visionary group of dance enthusiasts who have made special commitments in their estate plans to ensure the Joffrey's remarkable work continues for generations to come.

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 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 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