

# MAKING A PLANNED GIFT

Thank you for your support of San Francisco Ballet. The following instructions should be followed on how to specifically designate your planned gift to make sure it goes to its intended purpose.

## CHOOSING WHERE TO DESIGNATE YOUR GIFT

### Option 1: San Francisco Ballet Association

To provide SF Ballet with the flexibility to determine allocation of your contribution, you can leave your gift to San Francisco Ballet Association. Gifts left to the Association may be invested to generate income or used in the year they are received. This allows SF Ballet to decide how your gift can best be used to support our mission.

Tax ID: 94-1415298

### Option 2: San Francisco Ballet Endowment Foundation

If you want to ensure that the principal of your gift will be held in perpetuity, you can leave your gift to San Francisco Ballet Endowment Foundation. This means that your gift will be added to the endowment and only the income and interest from your gift may be used to support SF Ballet, as determined by Endowment Foundation policies.

Tax ID: 94-2747262

## SAMPLE LANGUAGE FOR INCLUSION IN YOUR BEQUEST

Whether your gift is for the Association or the Endowment Foundation, you may designate it for San Francisco Ballet's general purposes so that it can be used where most needed, or you may designate it to support a particular need such as new works, the Ballet School, touring, or community education and outreach programs. The Ballet's planned giving office will work with you and your advisors to create language expressing your specific wishes, or you may adapt the following sample language when creating your plans.

*I give \$\_\_\_\_\_ [or \_\_\_% of my estate/trust] to San Francisco Ballet Association [or San Francisco Ballet Endowment Foundation]. It is my preference that my gift be used for \_\_\_\_\_ [e.g., general purposes, new works, touring, etc.]. If my gift cannot be used in accordance with my stated preference, then San Francisco Ballet may use my gift in a manner that most nearly accomplishes my wishes.*

## CONTACT US

If you have any questions or need assistance, please contact:

[legacycircle@sfballet.org](mailto:legacycircle@sfballet.org)

415-865-6635



SAN FRANCISCO BALLET  
HELGI TOMASSON, ARTISTIC DIRECTOR

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QUESTIONS? REACH OUT!