Your legacy shaping and underpinning the future of classical music through planned giving

CONTACT US TODAY TO DISCUSS PLANNED GIVING
PAIGE MYRICK, Director of Development
Telephone: 713-665-2700 • E-mail: paige@roco.org

SUPPORT WHAT YOU LOVE
Custom Options Are Available

LEGACY SOCIETY
CONTINUING THE CONNECTION

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IDENTIFY YOUR PRIMARY PLANNED GIVING GOALS & STRATEGIES TO MEET THEM

Different goals – personal or financial – can be met by different strategies, including:

- Reduce current/future taxes by contributing an outright gift including cash, appreciated securities, and IRAs, or through bequests in wills and living trusts.
- Maintain your current lifestyle by protecting assets and stabilizing or increasing income through Charitable Lead Trusts and Pooled Income Funds annuities.
- Reduce future taxes and maintain/increase current income through Charitable Remainder Trusts and Annuity Trusts.

CONSULT YOUR ATTORNEY & FINANCIAL ADVISOR

Planned giving is an important part of the financial picture for you and your heirs. ROCO highly recommends that you consult with an attorney and financial advisor on all matters involving planned giving.

CHECK OUT WAYS TO GIVE AT: https://roco.org/give/

How do I benefit from a planned gift?
A planned gift may enable you to make a much more significant impact on your future and the future of loved ones than you may have thought possible. It can save you and your heirs taxes while creating opportunities to support your favorite art form in a very impactful way.

How does ROCO benefit from a planned gift?
Your gift can make a significant impact on ROCO now and/or in the future. You also have the option to direct your support to a specific area of ROCO, such as a musician chair or commissioning projects.

What are the most common forms of planned giving to ROCO?
The most common planned gifts are designating ROCO as beneficiary in your retirement plan or life insurance policy and making a simple bequest in your will.

How do my family and other loved ones benefit?
A planned gift may create potential savings on capital gains taxes and/or estate taxes, lessening the financial burden on your family and loved ones. The potential assets you contribute to ROCO may reduce your tax liability because they would no longer be in your estate.

What is the suggested wording for a bequest?
"I give, devise and bequeath to ROCO, Inc. [the sum of $_____] or [____% of the residue of my estate]."  STILL HAVE QUESTIONS?

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