



# VISUALIZE ROCO'S PERSONAL CONNECTIONS LASTING THROUGH GENERATIONS.

ROCO can help you realize your vision.  
Your contribution can be made in your name,  
another's name, or anonymously.



## Make A Lasting Impact



# Legacy SOCIETY

CONTINUING THE CONNECTION

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

## SUPPORT WHAT YOU LOVE

Custom Options Are Available

**CONTACT US TODAY  
TO DISCUSS PLANNED GIVING**

**PAIGE MYRICK**, Director of Development  
Telephone: 713-665-2700 • E-mail: [paige@roco.org](mailto:paige@roco.org)

# ROCO.ORG





*Legacy* SOCIETY  
CONTINUING THE CONNECTION

## GET STARTED TODAY

*Your legacy can shape the future of classical music!  
A planned gift in support of ROCO  
makes a lasting impact.*

## HOW TO MAKE A LASTING IMPACT

### 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 a 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/>**



## FREQUENTLY ASKED QUESTIONS

### 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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