

# TheatreWorks

## SILICON VALLEY

PO Box 50458 Palo Alto, CA 94303-0458  
[www.theatreworks.org](http://www.theatreworks.org)

Ensure TheatreWorks will thrive well into the future with a Legacy Gift. There are many different gift options that will benefit both you and TheatreWorks:

GIFT TYPE	DESCRIPTION	YOUR GOAL	BENEFITS TO YOU
<b>Bequest</b>	A gift made to TheatreWorks from a will or revocable trust for a specified amount, percentage, or remainder of your estate.	Defer a gift until after your death.	<ul style="list-style-type: none"> <li>• Reduces size of taxable estate</li> <li>• Give you lifetime control of your estate</li> </ul>
<b>Retirement Plan</b>	A gift you make by designating TheatreWorks as a beneficiary of your IRA, 401(k) plan, 403(b) plan, deferred annuity contract, or defined benefit plan.	Avoid double taxation on retirement plan assets.	<ul style="list-style-type: none"> <li>• Heirs avoid income tax and possible estate tax</li> <li>• Preserve plan's value and allows you to leave heirs less costly bequests</li> </ul>
<b>Life Insurance</b>	A gift made by designating TheatreWorks as a beneficiary of your term, whole life, variable, or universal life insurance policies of \$50,000 or more.	Make a significant gift without a large cash outlay.	<ul style="list-style-type: none"> <li>• Immediate income tax deduction for gift's value</li> <li>• Possible future tax savings</li> </ul>
<b>Charitable Remainder Trust</b>	Trust that pays a set or variable income to you or those you name. At the end of the term, TheatreWorks receives the remaining value of the trust.	Set up an income stream for yourself during your lifetime.	<ul style="list-style-type: none"> <li>• No capital gains tax</li> <li>• Immediate income tax reduction</li> <li>• Lifetime fixed income</li> <li>• Possible estate tax savings</li> </ul>
<b>Charitable Lead Trust</b>	A trust that pays a charity an income for a period of years before you or the designated heir receives the remaining value of the trust.	Reduce taxes on assets left to heirs.	<ul style="list-style-type: none"> <li>• Decrease size of taxable estate</li> <li>• Avoid large gift taxes</li> </ul>

For more information, call 650.463.7135 or email [legacy@theatreworks.org](mailto:legacy@theatreworks.org)