Play your part to ensure the future of the Boston Symphony Orchestra by including the BSO, Boston Pops, or Tanglewood in your long-term gift plans. It is a meaningful way to affirm the BSO’s transformative musical mission while achieving your own financial and philanthropic goals.

A VARIETY OF OPTIONS
There are many ways you can support the Boston Symphony Orchestra through creative planned gifts. With careful planning, your gift can:

- Furnish you with an attractive income stream
- Reduce the tax burden on you or your heirs
- Provide for those who mean most to you

Most important, your gift will provide musical inspiration for so many in the future.

For more information and a detailed, personalized gift illustration, call the Office of Planned Giving toll free at 888-244-4694 or email plannedgiving@bso.org.

All inquiries will be handled in strict confidence.
Types of Planned Gifts

BEQUEST
One of the simplest ways to make a gift to the Boston Symphony Orchestra is to include a contribution in your will or living trust. Bequests can be changed at any time (although you may also make your plans irrevocable) and can be for a specific asset or dollar amount, a percentage of what remains in your estate after your death, or contingent on other factors important to you.

CHARITABLE GIFT ANNUITY
In exchange for your gift of $10,000 or more, a gift annuity would produce fixed payments for life for you and/or another individual. These payments are based on the age(s) of the designated beneficiaries at the time of the gift and the size of your gift. At the end of the gift annuity contract (typically the death of the income beneficiary/ies), the funds are used by the BSO for one or more purposes agreed upon when the annuity was created.

CHARITABLE REMAINDER TRUST
Charitable remainder trusts are among the most versatile gift vehicles that pay income. You can receive income for life from the trust, and the BSO receives the remainder when the trust terminates. Moreover, charitable remainder trusts can be structured to pay either fixed or variable income. Other benefits include:
- Attractive income for life or term of up to 20 years
- An income tax charitable deduction equal to a portion of the gift amount
- No up-front capital gains tax if long-term appreciated property is donated

CHARITABLE LEAD TRUST
A lead trust is designated to pay income to the BSO for a term of years, after which the trust’s balance would pass to you or family members. When a lead trust is created for the future benefit of children or grandchildren, estate gift taxes can be reduced or even eliminated. Other benefits include:
- Annual payouts that support the BSO’s mission
- Significant reduction in gift and/or estate taxes
- Retention of assets in the family

RETIREMENT PLAN ASSETS
By naming the BSO as an ultimate beneficiary of your IRA, or 401(K) or other qualified retirement plan, you can make a future gift while continuing to take required withdrawals during your lifetime. Remaining assets will then pass tax-free to the BSO.

REAL ESTATE
Real estate gifts can provide transformative ways to support the BSO. Gifts of real estate can take many forms, including:
- Deeding all or a portion of a piece of real estate to the BSO before entertaining purchase offers
- Using debt-free real estate to fund a charitable reminder trust
- Transferring your home or farm to the BSO now, while retaining lifetime use of the property

Gifts of real estate are unique, and the BSO must evaluate each proposed gift on its own merits to ensure that the gift is mutually beneficial to you and to the BSO.
Established in 1987 and named for Pulitzer Prize-winning composer Walter Piston, who endowed the BSO’s Principal Flute Chair with a bequest, the Walter Piston Society honors those who have provided for the future of the Boston Symphony Orchestra, Boston Pops, or Tanglewood by establishing a bequest (will, trust, IRA, or insurance policy), charitable trust, or gift annuity.

Members of the Walter Piston Society are thanked in a variety of ways, including:

- Invitations to events in Boston and at Tanglewood
- Opportunities to attend exclusive lectures and seminars with BSO musicians
- Recognition in program books and the BSO’s annual report

YES, I am interested in learning more about gift options to support the future of the Boston Symphony Orchestra, Boston Pops, or Tanglewood. Please contact me:

________________________________________
NAME
________________________________________
PHONE
________________________________________
EMAIL
- I’d like to learn more about gifts that provide income
- I’d like to learn more about estate gifts
- The BSO, Boston Pops, or Tanglewood is included in my will or is a beneficiary of my retirement plan
- Other: ___________________________________

Please detach and mail this form. Your privacy is important to the BSO. All inquiries are confidential.

Mail this form to:
Office of Planned Giving
Symphony Hall
301 Massachusetts Avenue
Boston, MA 02115
888-244-4694 | bso.org/plannedgiving

The information in this brochure is provided as a general overview of various gift options that can be used to support the BSO. The options described are not intended to be investment vehicles. Before creating such a gift, you should consult with your tax or legal advisors to determine whether it is appropriate for you in the context of your overall financial and estate plans.

All gifts are subject to review and approval by the BSO prior to acceptance.