



Leave a **LEGACY**

Planned Giving at



BLUMENTHAL
PERFORMING ARTS



The mission of Blumenthal Performing Arts is to present the best in the performing arts and in partnership with others, share and employ the arts as a major catalyst to strengthen education, build community cohesiveness and advance economic growth.

Founded in 1987 and hosting the inaugural season of touring Broadway productions in 1992, Blumenthal's story is one of big dreams and big dreamers. An uptown performing arts center was integral to the effort of Charlotte's most visionary leaders to remake center city Charlotte into an international financial hub.

- We present the largest Broadway season in the Carolinas, hosting **24 weeks** of Broadway shows annually, along with a large array of special attractions and festivals, from concerts to comedy to dance to the Charlotte International Arts Festival and much more.
- We inspire kids and use the arts as a powerful tool to support education. More than **150,000** students participate annually in our student-focused programs ranging from internships to specially priced show tickets to The Blumey Awards, which celebrates excellence in high school musical theater in our region.
- We shape the future of the arts through the new and original works we help produce and by nurturing artists. We support Charlotte artists through initiatives like **Blumenthal Fellows** and our award-winning **Slam Charlotte** poets.
- We infuse more than **\$50 million** annually into our local economy.
- We help shape each Broadway season in New York through our investments in new musicals, and we have won **10 Tony Awards**.
- We believe the arts unite and transform communities, and we ensure equitable access through our **Arts for All Access Grants**, which serve thousands of individuals each year with subsidized ticket and program offerings.

Do you remember your first time experiencing the magic of live theater? Think about that first experience – and all of the experiences you have had since. The theater is a place where we can come together as a community, regardless of our backgrounds or circumstances, to enjoy powerful shared experiences. Blumenthal Performing Arts is honored to create and present transformative programming in a way that is truly unique in the Charlotte region. Would you like to help ensure that others have the opportunity to experience the power of the performing arts too?





Making a planned gift is a wonderful way to show your support for our mission, while achieving your own philanthropic, estate-planning, and financial goals. Planned gifts can benefit you and your loved ones today and in the future and allow Blumenthal to present the world's most renowned artists, engage students and learners of all ages through arts education, create groundbreaking new works, and celebrate Charlotte's proud arts legacy.

Blumenthal's Legacy Society pays tribute to those visionary supporters who have helped to preserve our community's artistic future for the enrichment of generations to follow with a designation in their wills or other planned gifts. Legacy Society members are given opportunities to become more deeply connected with Blumenthal, including special behind-the-scenes events and gatherings, lifelong Producers Circle membership, and with special acknowledgment in all donor listings unless otherwise requested.

Consider a planned gift and ensure that Blumenthal Performing Arts' diverse programming and meaningful programs thrive for generations to come. It can also provide you with options to minimize your overall tax liability while maximizing your benefits. There are many ways you can structure a planned gift to perpetuate Blumenthal Performing Arts' commitment to artistic excellence and can provide significant benefits to donors and their heirs.

Some examples of planned giving vehicles are outlined below.

BENEFICIARY GIFTS

A beneficiary designation gift using a financial instrument is a simple and affordable way to make a planned gift. Even after you complete the beneficiary designation form, you can take distributions or withdrawals from your retirement, investment or bank account. You can also change your mind for any reason at a future date. A gift through a beneficiary designation is simple and flexible.

BANK ACCOUNTS AND BROKERAGE ACCOUNTS

Simply access your account and add the North Carolina Performing Arts Center at Charlotte Foundation C/O Blumenthal Performing Arts (EIN # 58-1791724) as a primary portion of your remaining retirement assets.

DONOR-ADVISED FUNDS

The remaining amount in your DAF is governed by the contract you completed when creating the fund. Consider naming the North Carolina Performing Arts Center at Charlotte Foundation as a "successor" to your account or designate a portion of your account. You'll be eligible for a current-year tax deduction and can be more strategic about your giving decisions.

RETIREMENT FUNDS

Retirement fund assets are some of the most highly taxed assets when left to individuals other than a spouse, but are not taxed to charitable organizations. You can name the North Carolina Performing Arts Center at Charlotte Foundation as a primary or contingent beneficiary to all or a portion of your remaining retirement assets.

LIFE INSURANCE

A gift of whole life insurance can be made by transferring the ownership of an existing policy to the North Carolina Performing Arts Center at Charlotte Foundation, assigning us as a charitable beneficiary, or purchase a new policy and name us the owner and beneficiary.

CHARITABLE GIFT ANNUITY

A charitable gift annuity (CGA) is a contract between a donor and a charity with the following terms: As the donor, you make a sizable gift (minimum \$10,000) to charity using cash, securities or possibly other assets. In return, you become eligible to take a partial tax deduction for your donation, plus you receive a fixed stream of income from the charity for the rest of your life.



SAMPLE BEQUEST LANGUAGE TO EXPRESS INTENT OF A PLANNED GIFT

I hereby give, devise and bequeath _____ and No/100 dollars (\$_____) to the North Carolina Performing Arts Center at Charlotte Foundation or its successor, a nonprofit organization currently located at 130 N. Tryon St., Charlotte, NC 28202, Federal Tax ID #58-1791724, for the purpose as directed by my gift agreement with Blumenthal Performing Arts. If no agreement exists, it shall be used for general use and purpose.

You may also choose to give, devise and bequeath a percentage of your total estate, determined as of the date of your death.



Our high impact programming is only possible with your support. Consider including Blumenthal Performing Arts in your estate plans and secure the future of our mission. Please contact Samantha Kowert, vice president of Development, at Samantha.kowert@blumenthalarts.org or 704.379.1359 to discuss your unique plans.

The gift planning information presented is intended as general. It is not to be considered tax, legal, or financial advice. Please consult your own advisers prior to any decision, eligibility and use of an income or estate tax deduction is based on your personal circumstances.