



Sample Bequest Language

Bequests are vital to Sarasota Orchestra's artistic vitality and financial stability. Bequests and beneficiary designations may be directed to Sarasota Orchestra (to provide annual operating support) or to the Endowment.

The wording of a bequest provision will vary depending upon the type of gift you desire to make and whether such a gift may be restricted. Examples of appropriate language are written below.

In all cases, you should consult with a qualified attorney who can review your goals in light of applicable federal and state laws, and draft your will to reflect your specific wishes. It is also important to consult with Sarasota Orchestra if you are considering a restricted gift to ensure that the proposed restriction can be honored.

Specific Bequest:

"I give to (Sarasota Orchestra (for operating funds) OR Sarasota Orchestra for Endowment), a Florida nonprofit organization, _____ (property or dollar amount.)"

Residuary Bequest:

"I give to (Sarasota Orchestra (for operating funds OR Sarasota Orchestra for Endowment)), a Florida nonprofit organization, (all or a percentage) of the rest, residue and remainder of my estate."

Specific Percentage Bequest:

"I give to (Sarasota Orchestra (for operating funds) OR Sarasota Orchestra for Endowment), a Florida nonprofit organization, _____ per cent of my estate."

If you include the Sarasota Orchestra or the orchestra's Endowment in your will, we would appreciate receiving a copy of the relevant portion. This provides us with the opportunity to acknowledge your bequest intention and invite you to join the Encore Society so that you can enjoy its membership benefits. If desired, a Sarasota Orchestra representative is available to meet with you and your advisors to assist in your charitable planning goals. All inquiries will be held in strict confidence.

For more information, please contact Senior Director of Donor Engagement for Leadership Giving **Jocelyn Udell** at **941-487-2716** or judell@sarasotaorchestra.org, or by mail at Sarasota Orchestra, 709 N. Tamiami Trail, Sarasota FL 34236.

Sarasota Orchestra is a registered 501(c)(3) nonprofit organization. Tax ID# 59-2603081