

THE SHOW MUST GO ON

—EVEN AFTER WE’VE GONE!



A Simple Guide to Making a Bequest

Creating an estate plan isn’t just about legal documents or financial accounts—it’s about love, values, and legacy. When you make a bequest to Arena Stage, you leave a legacy that ensures the stories, performances, and community you love continue to thrive for future generations.

This guide will help make the process less intimidating and more inspiring.

Why Make an Estate Plan?

Without an estate plan, you lose control of how your money, home, and personal treasures are shared after your lifetime. That means:

- The state decides where your assets go
- Your loved ones may face unnecessary stress and expenses
- The causes you care about may be left out completely

With a plan, **you stay in control**, and you can maintain your values, relationships, and legacy. It’s not just about you—it’s about not leaving people wondering what to do. Being prepared makes it easier for the loved ones you leave behind.



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Getting Started Step-by-Step:

1. Reflect on What Matters Most

Who is important in my life?

- Family?
- Friends?
- Pets?

What organizations do I want to support beyond my lifetime?

- Arena Stage?
- Other charities or causes?



Write a legacy or love letter to those you love. Tell them what is important to you and how you would like them to use what you leave—or that they have your blessing to let it go.

2. Take Stock of What You Have

Gather a list of your assets. You may have more to give than you think.

3. Think About How You Want to Distribute Your Legacy

Considering the relative importance of people and organizations you love will help you decide how much to leave for each. Using percentages allows the plan to automatically adjust with fluctuations in values. For example:

1. “I leave 50% of my IRA to Arena Stage and 50% to my daughter.”
2. “I leave my china and paintings to my niece.”
3. “After my spouse passes, the remainder of my estate goes 90% to my children and 10% to Arena Stage.”

IRA assets are a great and tax-efficient gift for a non-profit organization as they do not pay taxes.

4. Make It Official (and Easy)

For simple wills, consider online options like FreeWill.com or TrustAndWill.com. For a complex estate, use an attorney. To find an attorney, ask a trusted contact or search at Martindale.com or the ACTEC Directory. Additionally, ensure you add beneficiary designations for all your accounts such as your IRA, bank accounts, stock portfolios, life insurance, and donor-advised funds.



Sample Bequest Language

“I give and devise to Arena Stage (Tax ID #53-0246894), all (or \$___ or ___%) of the rest, residue, and remainder of my estate, both real and personal, to be used for its general support.”

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Decide How to Distribute Your Assets

Specify who receives tangible personal property such as jewelry and automobiles. Detail what happens to your residence(s) or other real estate. Leave specific assets or cash to family members, friends, or charitable organizations you care about such as Arena Stage. Use percentages so that the plan will automatically adjust with the size of your assets.

Beneficiaries

Friends, Family, etc.

Name

What You Wish to Give

Charitable Beneficiaries

Organization

What You Wish to Give



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Meeting with an estate planning attorney?

Use the prompts below to collect information necessary to prepare.

I. Vital Statistics

A. Personal Information

Name _____

Date of Birth _____ Place of Birth _____

Home Address _____

City _____ State _____ Zip _____

Phone _____ Email _____

Social Security No. _____ Military Service No. _____

Taxpayer Identification No. _____

B. Marital Information

Present Marital Status:

Married Single Divorced Legally Separated Widowed

Spouse’s Name _____

Date and Place Married _____

Marriage Certificate Located _____

Formerly Married to _____

Date and Place Married _____

Marriage terminated by:

Death Divorce Annulment



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C. Family Information

Children’s names, birth dates, and addresses:

Brother’s and sister’s names, birth dates, and addresses:

Grandchildren’s names, birth dates, and addresses:

Personal Comments:

D. Emergency Contacts



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II. Employment and Business Interests

Current Employer _____ Phone _____

Address _____

Date Employed _____ Position _____

Previous Employers _____

Other Business Interests:

• Name of Business _____

Type: Sole Proprietorship Partnership Closely Held Corporation

Value of Interest \$ _____

Disposition of business interests after death _____

• Name of Business _____

Type: Sole Proprietorship Partnership Closely Held Corporation

Value of Interest \$ _____

Disposition of business interests after death _____



Did you know that you can gift your home or business—
or part of it—to a non-profit and save taxes?



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III. Financial Information

A. Banks

• Bank _____

Address _____

Type: Individual Joint

Account No. _____ Balance \$ _____

In name(s) of _____

Beneficiary designation _____

• Bank _____

Address _____

Type: Individual Joint

Account No. _____ Balance \$ _____

In name(s) of _____

Beneficiary designation _____

B. Retirement Benefits

Pension Plan/Profit Sharing _____

Description _____

Stock option, type _____

Restrictions _____

Deferred-compensation plan _____

Payable Lump Sum \$ _____ or _____ @ \$ _____ per _____ for _____ years



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IRA/Keogh plan, other _____

Amount Invested \$ _____ Type of Investment _____

Options Available _____

IRA/Keogh plan, other _____

Amount Invested \$ _____ Type of Investment _____

Options Available _____

IRA/Keogh plan, other _____

Amount Invested \$ _____ Type of Investment _____

Options Available _____

Annuities

Source _____

Investment \$ _____ Payment Terms _____

Source _____

Investment \$ _____ Payment Terms _____

Other Retirement Benefits _____

Other Retirement Benefits _____



Pro Tip:

Retirement assets are highly tax-efficient to leave to non-profits like Arena Stage. Charities and nonprofits are tax-exempt whereas your heirs would have to pay tax when receiving IRA assets.

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C. Investment Accounts

Trusts

- Trustee Name _____ Phone _____
Address _____
Attorney of Record _____ Phone _____
Address _____
Type of Trust _____
Type: Revocable Irrevocable Estimated Value \$ _____
Retained Powers, if any _____
- Trustee Name _____ Phone _____
Address _____
Attorney of Record _____ Phone _____
Address _____
Type of Trust _____
Type: Revocable Irrevocable Estimated Value \$ _____
Retained Powers, if any _____



You can easily do a beneficiary designation of your investment accounts including Arena Stage and your other favorite charities.

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Stocks and Bonds

Company	Shares	Cost Basis	Date Acquired

Mutual Funds

Company	Shares	Cost Basis	Date Acquired



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U.S. Bonds

Type	Face Amount	Issue Date	Maturity Date
_____	\$ _____	_____	_____
Serial No. _____			

Type	Face Amount	Issue Date	Maturity Date
_____	\$ _____	_____	_____
Serial No. _____			

Type	Face Amount	Issue Date	Maturity Date
_____	\$ _____	_____	_____
Serial No. _____			

Cryptocurrency

Company	Shares	Cost Basis	Date Acquired
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Other Investments _____

Value _____

Other Investments _____

Value _____



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D. Charitable Gifts or Grants via Donor Advised Fund

- **Charity** _____
Type of Gift _____ Date _____
Phone _____
Comments _____
- **Charity** _____
Type of Gift _____ Date _____
Phone _____
Comments _____
- **Charity** _____
Type of Gift _____ Date _____
Phone _____
Comments _____
- **Charity** _____
Type of Gift _____ Date _____
Phone _____
Comments _____



DAFs must be passed with beneficiary designations, and not via your will. If you don't designate your own ultimate beneficiaries or successor, the DAF administrator will distribute it to *their* favorite charities.

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IV. Insurance Policy Documentation

A. Life Insurance

- **Company** _____
Face Amount \$ _____ Policy No. _____
Description of Policy _____
Date of Issue _____ Premium \$ _____
_____ Due on _____
Insured _____ Policy Owner _____
Primary Beneficiary _____ Secondary Beneficiary _____
Cash Value \$ _____ Loan Outstanding _____
Settlement Options _____

- **Company** _____
Face Amount \$ _____ Policy No. _____
Description of Policy _____
Date of Issue _____ Premium \$ _____
_____ Due on _____
Insured _____ Policy Owner _____
Primary Beneficiary _____ Secondary Beneficiary _____
Cash Value \$ _____ Loan Outstanding _____
Settlement Options _____



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B. Health, Medical, and Other Insurance Policies

Hospitalization _____ Policy No. _____

Company _____

Surgical _____ Policy No. _____

Company _____

Major Medical _____ Policy No. _____

Company _____

Medicare Supplemental _____ Policy No. _____

Company _____

Accident & Health _____ Policy No. _____

Company _____

General Liability _____ Policy No. _____

Company _____

Homeowner’s _____ Policy No. _____

Company _____

Automobile _____ Company _____

Description of Car _____ Policy No. _____

Description of Car _____ Policy No. _____

Description of Car _____ Policy No. _____

Other _____ Policy No. _____

Company _____

 **Pro Tip:** Be sure to name and update your beneficiaries regularly.

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V. Property



Consider whether specific property gifts should go to certain people or organizations. Is there a mortgage on the property and what is the balance?

A. Residences

• Description _____ Date Acquired _____
Cost Basis \$ _____ Addition to Basis _____
Current Value: Land \$ _____ + Building \$ _____
= Total \$ _____ Balance \$ _____
Terms _____ Date _____
Type of Trust _____

Held: Jointly Community Tenants-in-common

Names of other owners and percent contributed by each

• Description _____ Date Acquired _____
Cost Basis \$ _____ Addition to Basis _____
Current Value: Land \$ _____ + Building \$ _____
= Total \$ _____ Balance \$ _____
Terms _____ Date _____
Type of Trust _____

Held: Jointly Community Tenants-in-common

Names of other owners and percent contributed by each



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B. Investment Real Estate

- Description _____ Date Acquired _____
Cost Basis \$ _____ Addition to Basis _____
Current Value: Land \$ _____ + Building \$ _____
= Total \$ _____ Date _____
Mortgage _____ Balance \$ _____
Terms _____ Date _____
Type of Trust _____
Held: Jointly Community Tenants-in-common
Names of other owners and percent contributed by each

 You can donate a property or portion of a home to Arena Stage saving substantial capital gains taxes as well as a charitable tax deduction while supporting the theater you love. Ask Maya for more information.

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C. Personal Property

Vehicles

Description	Date Acquired	Approximate Value

Collectibles, Heirlooms, and Tools

Description	Date Acquired	Approximate Value

Art, Jewelry, and Kitchenware

Description	Date Acquired	Approximate Value



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VI. Obligations

Clarity here protects your family and estate.

A. Credit Cards

Company	Account No.	Line of Credit
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

B. Loans or Liabilities

- Due to _____ Phone _____
Address _____
Amount \$ _____ Terms _____ Due Date _____
Comment _____
- Due to _____ Phone _____
Address _____
Amount \$ _____ Terms _____ Due Date _____
Comment _____

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C. Accounts Receivable

- Due from _____ Phone _____
Address _____
Amount \$ _____ Terms _____ Due Date _____
Comment _____
- Due from _____ Phone _____
Address _____
Amount \$ _____ Terms _____ Due Date _____
Comment _____

D. Claims, Lawsuits, or Legal Judgments

The following claims or lawsuits are pending

- _____
- _____
- Attorney of record _____
Phone _____
 - Attorney of record _____
Phone _____
 - Attorney of record _____
Phone _____



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VII. Location of Important Papers

Vital Statistics _____

Last Will and Testament _____

Living Will _____

Living Trust agreement _____

Birth/Marriage Certificates _____

Deeds and Titles _____

Insurance Policies _____

Passwords and Logins _____

(Leave instructions on how to access digital assets or online accounts and subscriptions to cancel.)

Safety Deposit Box keys _____

Durable Power of Attorney _____

Power of Attorney for health care decisions _____

Guardianship of Children and/or Elderly Parents _____

Bank Statements _____

Tax Returns from past years and Tax Information for current year _____

Charitable Documents _____



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VIII. Personal Advisors Contact Information

- **Physician** _____
Address _____
Specialty _____ Phone _____
- **Physician** _____
Address _____
Specialty _____ Phone _____
- **Attorney** _____
Address _____
Phone _____
- **Accountant** _____
Address _____
Phone _____
- **Financial Advisor** _____
Address _____
Phone _____
- **Insurance Agent** _____
Address _____
Phone _____

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- **Executor of your Estate** _____
Address _____
Phone _____
- **Trust Officer** _____
Address _____
Phone _____
- **Investment Broker** _____
Address _____
Phone _____
- **Tax Consultant** _____
Address _____
Phone _____
- **Other** _____
Address _____
Phone _____
- **Other** _____
Address _____
Phone _____
- **Other** _____
Address _____
Phone _____



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IX. Funeral and Burial Instructions

- **Funeral Director** _____ Phone _____
Address _____
- **Religious Affiliation** _____
Clergy Person _____ Phone _____
- **Fraternal Affiliation** _____
Officer _____ Phone _____
- **Designation of memorial gifts** _____

Cemetery plot Cemetery Vault None Other _____
- **Disposition preference** (burial, interment, cremation, donation, etc) _____

- **Name, location** _____
Phone _____
Section No. _____ Plot No. _____
Location of deed _____
- **Other burial instructions** _____

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X. Last Will and Testament

- **Executor under will** _____
Address _____
Phone _____
Alternative _____ Phone _____
Address _____
- **Guardian/Conservator** _____
Address _____
Phone _____
Alternative _____ Phone _____
Address _____
- **Trustee** _____
Address _____
Phone _____
Date of last will _____ Codicil _____
- **Attorney of Record** _____
Address _____
Phone _____



Pro Tip:

Inform your executor where to find this guide

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XI. Notes to Your Executor

Write a personal message to be included with your Last Will and Testament

- Your wishes for your family and your causes.
- What’s important about the way you lived
- How you hope they’ll use (or release) what you have

A Complete Estate Plan Still Needs Periodic Review

Due to changes in personal and financial circumstances as well as revisions in tax laws, it is highly recommended to periodically review your plan.

Discuss Your Gift Planning With Us

We can show you the various forms of giving and how you can incorporate them into your Estate Plan.



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For more information about estate planning opportunities or to join the Full Circle Society which honors donors who have included Arena in their estate plans, recognizing their enduring commitment with special benefits and appreciation during their lifetime, please contact:



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