



# ARIA! LEGACY SOCIETY

The Aria! Society honors those who have committed to making a planned gift to The Santa Fe Opera, thereby strengthening the opera’s financial health and ensuring its extraordinary productions and wide-ranging education programs will be available to future generations.

## Become an Aria! Member

The Aria! Society was founded in 1997. By becoming a member of Aria! you will join those who have demonstrated their commitment to ensuring the mission of The Santa Fe Opera for the next 60 years and beyond. Members of Aria! are recognized in a place of honor in our season program book and are invited to an annual stewardship luncheon.

If you have already remembered The Santa Fe Opera in your estate plans, please let us know so we can include you as a member of Aria!

## Your Giving Options

The giving ideas highlighted in this brochure may provide a way for you to make a gift during your lifetime while at the same time provide significant benefits for yourself and/or your loved ones. Through your will, trust, retirement plans or insurance policies, you can plan gifts in ways that have little or no impact on your present financial position. You may even be able to increase your income today as you arrange for future gifts.

Your legacy gift can be made immediately, over a period of years or take effect after your lifetime. Including The Santa Fe Opera in your overall estate and financial plans can be a simple process. In many cases you can accomplish the desired results through minor modifications of your existing plans.

## Learn More

The chart inside summarizes the more traditional planned-giving vehicles, and the tax savings and other benefits associated with each. We will be more than happy to answer any questions you might have about planned giving. We can examine your situation and, together with your attorney and/or financial advisors, help you find ways to support The Santa Fe Opera while providing for your family’s financial future. Remember, a gift of any size is always welcome.

## 3 Easy Ways to Sign Up

-  Contact The Office of Planned Giving at 505-946-2428 or [aria@santafeopera.org](mailto:aria@santafeopera.org).
-  Mail the accompanying reply form to:  
Aria! Society  
The Santa Fe Opera  
P.O. Box 2408  
Santa Fe, NM 87504-2408
-  Visit [santafeopera.org](http://santafeopera.org) and click on “Donate.” Then click on “Planned Gifts” for more information.

Please contact our Office of Planned Giving and discover how simple it can be to make a gift that will ensure the future of The Santa Fe Opera.



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P O Box 2408 | Santa Fe, NM 87504-2408

Photos: Robert Godwin, Ken Howard, Tony Perry, Paul Horpedahl



THE SANTA FE OPERA  
AN ENDURING LEGACY

John Crosby,  
Founder, Conductor, and General Director of The Santa Fe Opera

# Choose the Gift Plan THAT MATCHES YOUR GOAL

Your Gift	Your Goal	How to Make the Gift	Your Benefits
<b>Bequest in Will</b>	Defer a gift until after your lifetime.	Name The Santa Fe Opera in your will (designate a specific amount, a percentage or a share of the residue).	<ul style="list-style-type: none"> <li>control of assets during your lifetime</li> <li>reduce your potential estate tax liability</li> </ul>
<b>Outright Gift of Securities</b>	Eliminate tax on capital gains.	Contribute long-term appreciated stocks, bonds, mutual funds or other securities.	<ul style="list-style-type: none"> <li>potential charitable deduction of full fair market value</li> <li>elimination of capital gains tax</li> </ul>
<b>Gift of Life Insurance</b>	Make a large gift with little cost to yourself.	Contribute a life insurance policy you no longer need or establish a new policy with The Santa Fe Opera named as beneficiary.	<ul style="list-style-type: none"> <li>qualify for an income tax charitable deduction</li> <li>possible future deductions through gifts to pay policy premiums</li> </ul>
<b>Gift of Retirement Assets</b>	Eliminate the twofold taxation on IRAs or other qualified retirement plans.	Name The Santa Fe Opera as the beneficiary of the balance left after your lifetime using the plan's beneficiary form.	<ul style="list-style-type: none"> <li>continue to make lifetime withdrawals</li> <li>make the gift from the most highly taxed assets, leaving more for family</li> </ul>
<b>Gift of Real Estate</b>	Make a gift that won't affect your current financial situation.	Name The Santa Fe Opera as the beneficiary to receive your real estate after your lifetime. Simply contact your attorney to prepare a transfer-on-death deed.* Sign it and have it recorded at your local recorder's office.	<ul style="list-style-type: none"> <li>maintain control of your property for as long as you live</li> <li>flexibility to change your designations if your situation changes</li> </ul>
<b>Charitable Remainder Unitrust</b>	Create a hedge against inflation over the long term and supplement your retirement income.	Create a trust that pays a fixed percentage of trust's assets as revalued annually.	<ul style="list-style-type: none"> <li>variable income for life</li> <li>potential income tax charitable deduction</li> </ul>
<b>Charitable Lead Trust</b>	Reduce gift and estate taxes on assets you pass to children or grandchildren.	Create a charitable trust that pays fixed or variable income to the Opera for a specific term of years; thereafter the balance is given to loved ones.	<ul style="list-style-type: none"> <li>reduces your estate administration costs</li> <li>property kept by your family, often with reduced gift taxes</li> </ul>



It began as the most audacious of dreams: a paradise for music in Santa Fe. And not simply music, but the absolute finest opera experience; a magical place that would be first among equals.

Against astounding odds, this is what the founder of The Santa Fe Opera, John Crosby, succeeded in creating in 1957.

\*State laws govern transfer-on-death deeds for real estate. Please consult with your attorney if you are considering this gift.

The information in this publication is not intended as legal advice. For legal advice, please consult an attorney.  
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