

Plan Your Gift Today- It's Easier Than You Think!

Contact Villa Musica by emailing giving@villamusica.org if you've already included Villa Musica in your plans or would like to learn more about your options.

While many gifts don't require a lawyer or a new will, we are happy to work with your professional advisors whenever it is helpful or desired.

You may also call 858-550-8100 and ask to speak with our Executive Director Dr. Fiona Chatwin.

BENEFICIARY DESIGNATIONS

Use the following information to identify Villa Musica in your retirement account, life insurance, or other beneficiary designations:

Villa Musica
10373 Roselle Street, Suite 170
San Diego, CA 92121
PHONE: 858-550-8100
FEDERAL TAX ID #: 20-3865008

SAMPLE BEQUEST LANGUAGE

For an unrestricted gift:

I give _____ [the sum, percentage, or description of property] to Villa Musica of San Diego, California to be used for its general tax-exempt purposes, but without other restriction as to use.

For a restricted gift:

I give _____ [the sum, percentage, or description of property] to Villa Musica of San Diego, California to be [used to support _____].

Planned Giving Options

inspired by *you*

If you are:

YOUR OPTIONS FOR TAX-SMART PLANNED GIFTS to Villa Musica INCLUDE

Age 21 or older

BENEFICIARY DESIGNATIONS for a percentage or all of:

- IRAs
- 401(k), 403(b), and other retirement plan accounts
- Life insurance policies

WILL and REVOCABLE TRUST AGREEMENT PROVISIONS

POD (PAYABLE-ON-DEATH) DESIGNATIONS on bank accounts

TOD (TRANSFER-ON-DEATH) DESIGNATIONS on brokerage accounts or for real estate.

Age 60 or older

All of the above, plus:

CHARITABLE GIFT ANNUITIES (gifts to Villa Musica in exchange for fixed income for life, with the remainder to Villa Musica.

CHARITABLE REMAINDER UNITRUSTS (gifts to a trust in exchange for variable income for life or for a term of years, with the remainder to Villa Musica

Age 70 1/2 or older

All listed, plus:

MAKE A GIFT FROM YOUR IRA: QUALIFIED CHARITABLE DISTRIBUTIONS (direct distributions from IRA administrators to Villa Musica; consult with your professional advisor and visit [website link here](#) for QCD information>> for more information)

SUBJECT TO ESTATE TAXES

CHARITABLE LEAD TRUSTS (contributions to a trust with annual payments to Villa Musica for a term of years, with the remainder for the benefit of family)

Plan Your Gift to Villa Musica



Help ensure that quality music education is accessible for generations to come.

What's Your Legacy?

You have a warm place in your heart for those that Villa Musica serves.

You appreciate the impact that participation in quality music education for those in our community for whom access is limited.

A Gift Anyone Can Make

Planned giving is for everyone, regardless of age, income or assets. It allows you to find smart ways to make meaningful gifts to the causes you care most about.

Planned giving strategies can be tailored to fit your unique circumstances.

A Planned Gift Can Allow You to:

- Choose to keep assets while you still want or need them
- Take care of family members and your favorite charities simultaneously
- Enjoy tax advantages with certain gifts
- Change your mind—some gifts are revocable
- Enjoy membership in Villa Musica's Legacy Society
- Make a real impact for future generations

We understand that the amount of your gift can change over time or that you may change your mind. While we ask donors to provide an approximate value of their gifts if realized today, Villa Musica's Legacy Society rosters never include your gift amount.



Making a planned gift to Villa Musica through your will or estate plan makes you a member of our Legacy Society, a very special group of our strongest supporters. As a member, you help ensure that Villa Musica endures as San Diego's Community Music Center; serving students of all ages and backgrounds regardless of ability to pay.

Already Made a Gift? Please Let Us Know.

IT'S HELPFUL TO US AND TO YOU, SO WE CAN:

- Express our appreciation and enroll you in the Legacy Society.
- Invite you to special events, tours and other "insider" opportunities
- Inspire others by your example (only with your consent)
- Document how you want to be recognized or your wishes to remain anonymous
- Understand how you'd like your gift to be used and what impact you'd like to make
- Help you explore options to meet your philanthropic and other goals

What is Planned Giving?

Planned Giving allows you to make larger gifts than you thought possible while protecting your ability to support your lifestyle or provide for your family. If providing access to music is near and dear to your heart, consider including Villa Musica in your estate plans, and you'll provide this important opportunity for generations to come.

It's easy make a gift to Villa Musica through your will or to name Villa Musica as a beneficiary of your retirement account or life insurance policy. Explore the many options to fit your personal goals and circumstances.

PLANNED GIFTS MAY COME IN MANY FORMS:

- Cash
- Appreciated stocks and bonds
- Mutual fund shares
- Retirement plan assets (qualified charitable distributions from IRAs or beneficiary designations)
- Private company stock and other closely held business interests
- Real estate
- Tangible personal property (e.g., artwork, musical instruments, vehicles)

WE'LL MAKE THE MOST OF YOUR GIFT

Unless otherwise specified, planned gifts are directed to Villa Musica, which makes music accessible through education, performance, and community engagement.

Your planned gift helps us ensure that no qualified application for Financial Aid is EVER turned down due to lack of funds.