



Pierre Monteux left his legacy in the form of a school. We invite you to help ensure that legacy for future generations ...

The Legacy Club

Through a planned gift, a donor can make a commitment for the future and receive a current tax benefit or other cost-saving advantages. Sometimes planned giving affords the opportunity for a donor to make a larger contribution than is possible through an outright gift. Those who make a planned gift become members of the *Pierre Monteux Legacy Club*, which is comprised of those individuals who have remembered the Pierre Monteux Memorial Foundation in their estate plans through their wills, trusts, and other mechanisms.



Bequests

Over the years, donors have included the Pierre Monteux Memorial Foundation in their wills with bequests that have greatly benefited thousands of students. Such gifts reduce estate taxes and provide opportunities for donors to leave a permanent legacy to the Monteux School.



Gifts of Life Insurance

A life insurance policy becomes a contribution when the donor turns the policy over to the Foundation as its owner and beneficiary. The donor can receive a number of tax benefits by making this designation. For example, premiums made on the policy can be considered charitable gifts; the cash value of the policy can be considered an immediate tax deduction for the donor; and the policy's value can be removed from the donor's taxable estate.



Charitable Remainder Trusts

Two types of charitable remainder trusts provide for an eventual gift to the Pierre Monteux Memorial Foundation at the same time that they generate lifetime income for the donor, or sequentially for the donor and then another beneficiary. An Annuity Trust pays the donor a fixed sum annually. A Unitrust pays the donor a fixed percentage of the fair market value of the trust's assets, which are valued annually. Both plans allow the donor to receive current charitable deductions based on the actuarial value of the trust at the time it is terminated.



Charitable Lead Trusts

With some kinds of charitable lead trusts, the donor does not have to relinquish a claim to the money or property used to establish the trust. Rather, the donor transfers assets into a trust which pays income to the Pierre Monteux Memorial Foundation for a specified number of years, after which the principal reverts to the donor or to the donor's heirs, with reduced estate and gift taxes.



Charitable Gift Annuities

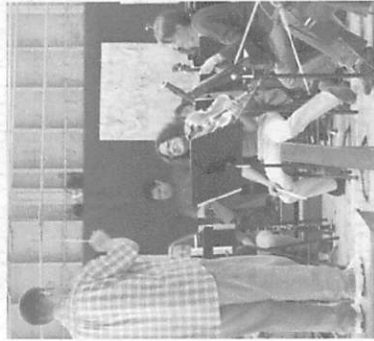
With a charitable gift annuity the donor transfers assets, typically cash or appreciated securities, to a nonprofit organization in return for a guaranteed fixed quarterly payment to the donor (or a designee) for life. The donor benefits by receiving a charitable tax deduction, and favorable tax treatment for the annuity income, and by deferring capital gains taxes and reducing estate tax liability.

"Conducting is not enough. I must create something. I am not a composer, so I will create fine young musicians."

—Pierre Monteux

Planned Giving

Long-range charitable gift arrangements, or "planned gifts," can provide immediate and long range financial and estate planning advantages to donors while providing lasting support for the Pierre Monteux School.



Planned gifts are a great way to leave a legacy because they help build our permanent endowment which provides sustained support for the School's programs and scholarships.

Some of the most popular planned giving methods are outlined in this brochure.

If you would like more information about these and other planned giving options, please contact Ron Schweizer, Treasurer, or your financial advisor or personal estate planner.

The
Pierre
Monteux
School

Legacy Club

Planning for the Future
of Conductors and
Orchestra Musicians

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The Pierre Monteux Memorial Foundation, sponsor of The Pierre Monteux School for Conductors and Orchestra Musicians, is a nonprofit, tax-exempt organization under section 501(c)(3) of the Internal Revenue Code.