

Sarasota Ballet

director · IAIN WEBB



THE MARTUCCI LEGACY SOCIETY

Planned Giving at The Sarasota Ballet

THE SARASOTA BALLET MISSION & VISION

MISSION: We enrich lives, captivate emotions, and strengthen community through the art of dance.

VISION: To infuse our community with the highest quality and diversity of dance in America.

In recognition of the importance of cultural diversity and to embrace all individuals in the beauty of dance, The Sarasota Ballet seeks to engage individuals of all languages, races, national origins, citizenships, religions, genders, sexual orientations, ages, and ranges of ability.





“A PLANNED GIFT IS A WAY TO PERPETUATE AND LEAVE A PART OF YOURSELF THAT WILL CONTINUE ON WITHIN THE ORGANIZATION.”

- FRANK MARTUCCI

MEET FRANK AND KATHERINE MARTUCCI

Frank and Katherine Martucci have been active with The Sarasota Ballet since 2014. Frank currently serves on the Board of Trustees. Together, Frank and Katherine have made significant contributions to arts and culture, and social service organizations here in Sarasota.

The Martucci Legacy Society recognizes and celebrates patrons who have made provisions for The Sarasota Ballet through their estate plans or wills. Planned or legacy gifts create a lasting impact on our organization, supporting artistic, education, and community programs for generations to come. Members of The Martucci Legacy Society receive special benefits throughout the Season as well as special recognition and a luncheon in their honor.

WHAT IS A PLANNED GIFT?

A planned or legacy gift is a donor's intention to contribute a gift to an organization beyond their lifetime. Unlike an outright gift made for current use, a planned gift is for the future.

IS PLANNED GIVING RIGHT FOR ME?

The Sarasota Ballet provides a variety of ways to make a planned gift to fit your needs, interest, and lifestyle. Each type of planned gift (detailed on the following page) provides different benefits and flexible options. A planned gift to The Sarasota Ballet may be the right choice for you for the following reasons:

- > Our mission and vision resonate with your personal goals and passions. Your commitment to The Sarasota Ballet lives on with a planned gift.
- > Planned gifts are not limited by current wealth. Although you may not be able to support The Sarasota Ballet now in the ways you would like, by establishing a planned gift, you can create a lasting impact on our organization for generations to come.
- > After notifying The Sarasota Ballet of your planned gift, you can begin receiving benefits right away. Benefits include special recognition throughout the Season, invitations to events, and unique behind-the-scenes access, bringing you even closer to the art form of dance.





MAKING A PLANNED GIFT

WHERE SHOULD I DIRECT MY GIFT?

THE SARASOTA BALLET

A planned or legacy gift to The Sarasota Ballet supports artistic, education, and community programs for generations to come.

THE SARASOTA BALLET ENDOWMENT FUND

The Sarasota Ballet Endowment Fund provides the organization with resources to enable long range planning and special artistic projects, and to provide stability to both operational cash flow and operating results. Planned gifts to The Sarasota Ballet Endowment Fund are permanently restricted to The Sarasota Ballet Endowment Fund.



PLANNED GIFT METHODS

From bequests in your Will to IRA distributions, there are many different ways you can shape your planned gift to The Sarasota Ballet. Your gift may be a specific dollar amount, a percentage of your estate, or the remainder after all other provisions are specified.

> ESTATE GIFTS

As you create a plan for the future of your estate, consider naming The Sarasota Ballet in your living trust or including a bequest in your will. You can name either a specific amount or a percentage.

> LIFE INSURANCE BENEFICIARY

When choosing a beneficiary for your Life Insurance Policy, consider naming The Sarasota Ballet. This option is especially convenient for our donors with paid-up policies that are no longer need for family protection.

> RETIREMENT PLAN

Qualified retirement plans can be left to SF Ballet. These assets are under less severe taxation when distributed to a charity rather than to an individual. Most IRA's, 403B's, and 401k's are accepted. You can also use your IRA during your lifetime to make donations.

> CHARITABLE GIFT ANNUITY

This is an ideal option to support The Sarasota Ballet while providing a fixed and guaranteed income for you or a loved one over 65 years of age. The rate of income increases based on the beneficiary's age at the time of gift designation.

> CHARITABLE REMAINDER TRUST

Best for donations of \$250,000 or more, this is an independently managed gift that provides you with maximum flexibility. You create the terms of the trust in a way that best benefits you or another income beneficiary, The Sarasota Ballet, and any other charities you wish to support. Real Estate can also be committed in this way.

> CHARITABLE LEAD TRUST

A Charitable Lead Trust is an irrevocable trust designed to provide financial support to one or more charities for a period of time, with the remaining assets eventually going to family members or other beneficiaries. Charitable lead trusts are often considered to be the inverse of a charitable remainder trust.

> REAL ESTATE

Real Estate can either be donated as a retained gift or as a standard gift. Retained real estate allows you to receive an immediate charitable income tax deduction while retaining the right to use the property during your lifetime, whether it's your primary home, vacation home, or some other use. Standard gifts of real estate can be made during your lifetime or in your will or living trust; in this case, you donate the property outright and receive the charitable income tax deduction at time of donation.

YOUR INVITATION TO JOIN

Patrons who include The Sarasota Ballet in their will or estate plans are invited to join The Martucci Legacy Society. As a member of The Martucci Legacy Society, you receive special benefits and recognition throughout the Season including:

Recognition Benefits

- > Listing in Annual Magazine
- > Listing in Season Program Book
- > Listing in Performance Programs
- > Recognition on our website dedicated to Legacy Society members and their stories
- > Recognition in other publications throughout the Season

Press/Media Benefits

- > Press release for planned gifts of \$500K and above
- > Announcements of new members during the Season

Hospitality Benefits

- > Invitation to attend the annual Legacy Luncheon
- > Behind-the-scenes access through rehearsals and more

*We invite you to join
The Martucci Legacy Society today and create
a legacy of dance for future generations!*



NEXT STEPS

1. Contact Lauren Stroman, Development Director at 941.225.6510 or lstroman@sarasotaballet.org for additional information or to discuss different options for including The Sarasota Ballet in your will or estate plan.
2. Seek advice from your financial or legal advisor.
3. If you include The Sarasota Ballet in your plans, please use our legal name and federal tax ID.

Legal name: Sarasota Ballet of Florida, Inc.

Address: 5555 N Tamiami Trail Sarasota, FL 34243

The Sarasota Ballet's Federal tax ID number:

65-0135900

For our downloadable bequest commitment form, scan here





LEADERSHIP GIFTS

The Sarasota Ballet is incredibly grateful for the leadership support from the following individuals through their planned gifts:



**MARCIA JEAN TAUB AND
PETER SWAIN**

Marcia Jean Taub and Peter Swain have announced a leadership gift to The Sarasota Ballet in memory of Marcia Jean's parents, Ron and Ethel Taub. Marcia Jean currently serves on the Advisory Council. She and Peter support many important initiatives at The Sarasota Ballet, including the Live Music Fund and Dance – The Next Generation. "Following her parents' footsteps, Marcia Jean and Peter continue to provide incredible support for The Sarasota Ballet", states Executive Director, Joseph Volpe. "We cannot thank them enough for their commitment to our organization's future through this incredible gift."

In the Spring of 2022, Jan Sirota and his wife, Alison Gardner announced a leadership gift to The Sarasota Ballet. Jan currently serves on the Board of Trustees and Education Committee. He is also a volunteer mentor with Take Stock in Children, an organization that partners with The Ballet's Dance – The Next Generation program. "We are so grateful for Jan and Alison's support, and in particular, their commitment to our education programs", says Director, Iain Webb. "This gift will have a significant impact on The Sarasota Ballet for years to come."



**JAN SIROTA AND
ALISON GARDNER**

MEMBERS OF THE MARTUCCI LEGACY SOCIETY

The Sarasota Ballet is proud to recognize the following individuals for their commitment to The Sarasota Ballet's future:

George Allison and Alan Watkins
Donald H. and Barbara K. Bernstein
Jerry and Gay Bowles
Martin and Barbara Bowling
Murray Bring and Kay Delaney Bring
Donald Britt
Ann Burroughs
Judy Cahn
Lynn Chancer
Jonathan Strickland Coleman* and Rick Kerby
Edward N. Cooke
Dan Denton
Douglas Endicott
Laura Feder**
Frances D. Fergusson**
Kathleen A. Fischer and Chuck Angulo
Micki H. Gamer
Cope and Anne Garrett
Ellen Goldman
★ Jean Weidner Goldstein
Patricia A. Golemme*
Gudrun Graugaard
Gerald and Deborah Hamburg
★ Julie A. Harris*
Elaine C. Herda
Richard S. Johnson*
In Loving Memory of Marsha Johnson
Deborah Roesch Kalb
In Loving Memory of Ellen "Mom" Roesch
Richard Kemmler

Pat* and Ann Kenny
Ernie Kretzmer
Lydia Landa
Julia Laning
Harry Leopold and Audrey Robbins*
Dr. Bart and Joan Levenson
★ Richard March**
★ Frank* and Katherine Martucci
Joan Mathews**
Mary Jane McRae
Peter B. Miller* and Dr. Martha Harrison
Sandra Miranda
Stu and Gini** Peltz
Dr. Richard L. Prager
Rose Marie Proietti**
Mary Jo Reston
Terry and Susan Romine
Will A. Ryall
Micki Sellman**
Bud and Betty Shapiro
Arthur Siciliano and B. Aline Blanchard
★ Jan Sirota* and Alison Gardner
Hillary Steele*
Melliss Kenworthy Swenson**
★ Marcia Jean Taub** and Peter Swain
In Loving Memory of Ethel and Ron Taub
David Welle* and Rosemary Reinhardt
Kim Wheeler
Richard Wires

★ Denotes Leadership Gift *Denotes Board of Trustees **Denotes Advisory Council

This listing is accurate as of January 18, 2023. For questions regarding Legacy Donor listings, please contact the Development Department at 941.225.6510



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