

**FINANCIAL MANAGEMENT AND
PROFESSIONAL ADVICE:**

CMS currently has a custodial agreement with the Arizona Community Foundation to manage the CMS endowment funds.

A donor may direct that the donated funds must be managed by professional management pursuant to a custodial agreement with the Arizona Community Foundation, or a donor may allow CMS to manage the funds internally for operational purposes.

The CMS gift acceptance policy states that advice offered by representatives of CMS must be accompanied by a written recommendation that the prospective donor consult his or her own attorney and/or tax counsel.

It is also the donor's responsibility to obtain any necessary appraisal, file appropriate personal tax returns, and defend against any challenges to claims for tax benefits. If you currently do not have an estate tax attorney or tax advisor, you may contact the CMS office to obtain a list of attorneys and tax advisors who specialize in the area of estate planning.

Should you have any questions about including Chamber Music Sedona (CMS) in your will or trust, please contact a member of the Board of Trustees, or call the CMS office at (928) 204-2415.

If you establish a gift to Chamber Music Sedona in your will or your trust, you will be acknowledged in each CMS season program as a member of the Legacy Society in perpetuity.

The Chamber Music Sedona Federal Tax ID is: 94-2920643

Chamber Music Sedona
1487 W St Rt 89A, Ste, 9, Sedona, AZ 86336-5773
928.204.2415



MAGICAL MUSIC IN THE RED ROCKS



LEGACY SOCIETY
Bequest Opportunities
2011-2012

INCLUDING CHAMBER MUSIC SEDONA IN YOUR ESTATE PLANNING INSTRUMENTS

The mission of Chamber Music Sedona is to enrich the lives of northern Arizona residents and visitors by presenting the finest international, national, and regional performing artists and to promote a love of the performing arts through arts education programs.

By including Chamber Music Sedona (CMS) in your will, living trust, or other estate planning instruments, you will help CMS continue to pursue its goals as established in its mission statement.

There are several ways to make gifts to support Chamber Music Sedona (CMS) through your will or living trust. It can be as simple as adding any of the following text:

SAMPLE BEQUEST LANGUAGE

A GENERAL BEQUEST

PERCENTAGE OF ESTATE - UNRESTRICTED FUND:

In a will:

I give to Chamber Music Sedona, an Arizona non-profit corporation, located in Sedona, Arizona, _____% of the residue of my estate for the general purposes of Chamber Music Sedona in accordance with the policies and mission of Chamber Music Sedona in effect from time to time. The Fund shall be known as the “_____” Fund.

In a trust:

Upon the death of the Trustor (or the Surviving Trustor), the Trustee shall distribute _____% of the residue of the trust estate to Chamber Music Sedona, an Arizona non-profit corporation, located in Sedona, Arizona for the general purposes of Chamber Music Sedona in accordance with the policies and mission of Chamber Music Sedona in effect from time to time. The Fund shall be known as the “_____” Fund.

DOLLAR AMOUNT-UNRESTRICTED FUND:

In a will:

I give to Chamber Music Sedona (CMS), an Arizona non-profit corporation, the sum of \$_____, for the general purposes of CMS in accordance with the policies and mission of CMS in effect from time to time.

The Fund shall be known as the “_____” Fund.

In a Trust:

Upon the death of the Trustor (or the Surviving Trustor”, the Trustee shall distribute the sum of \$ _____ to Chamber Music Sedona (CMS), an Arizona non-profit corporation, located in Sedona, Arizona for the general purposes of CMS in accordance with the policies and mission of CMS in effect from time to time.

The Fund shall be known as the “_____” Fund.

A SPECIFIC BEQUEST:

SPECIFIC PROPERTY: In a Will:

I give to Chamber Music Sedona (CMS), an Arizona non-profit corporation, located in Sedona, Arizona, my interest in (describe the property and the exact location of the asset) to establish the “_____” Fund for the general purposes of CMS in accordance with the policies and mission of CMS in effect from time to time.

In a Trust:

Upon the death of the Trustor (or Surviving Trustor), the Trustee shall distribute to Chamber Music Sedona (CMS), an Arizona non-profit corporation, located in Sedona, Arizona, (describe the give and the exact location of the asset) to establish the _____fund for the general purposes of CMS in accordance with the policies and mission of CMS in effect from time to time.

DESIGNATED OR RESTRICTED GIVING:

You can also direct CMS to use the principal for current needs, or to use the income only (endowment) to support a variety of programs. Your bequest can be unrestricted as to its use as in the sample language above, or restricted for a specific purpose, such as to support specific programs or fields of interest.

Examples of field of interest funds may include:

Chamber Music concert underwriting
The Met: Live in HD underwriting
Community Music Education
Festival underwriting
Quick-Bowman Piano Competition
Steinway Piano funds