



Grainger Circle

LEAVING A BEQUEST TO
Adelaide Symphony Orchestra



aso

Every bequest, no matter what size, helps secure the future of Adelaide Symphony Orchestra

Established in 1936, the much loved ASO is South Australia's largest performing arts organisation. Celebrating 85 years in 2021, the orchestra's longevity has only been possible through the support of donors who share a passion for keeping orchestral music a part of the cultural fabric of Adelaide. Today the ASO plays a major role in the city's cultural and economic vibrancy, and enriches the community through a diverse program of world-class performances, music education programs and community events.

Bequests are extremely important to the future of Adelaide Symphony Orchestra.

We invite you to consider making a bequest to Adelaide Symphony Orchestra, investing in the next 85 years and beyond.

Your support will help inspire future generations and ensure orchestral music continues to thrive in South Australia.



WHAT YOUR GIFT WILL SUPPORT

Gifts received by the Adelaide Symphony Orchestra contribute to our season program, music education and community activities, instrument purchases and maintenance, musician health and wellbeing, and the general running costs required to operate a world class orchestra. Your gift will be used at the discretion of the orchestra where the funds are needed most, to help us continue our mission.

If you would like to leave a gift in your Will for a particular purpose please contact us first to discuss your wishes. If you are too specific in your wording, when the time comes it may be impossible or impractical for us to accept your bequest and fulfil its stated purpose. However, we can certainly work together to ensure that your particular area of interest is supported.

LEGAL AND TAX ADVICE

When drafting a Will, we recommend that you seek advice from a lawyer or The Public Trustee in your state or territory. If you already have a Will and wish to add Adelaide Symphony Orchestra, you can simply add a codicil, signed and witnessed in the same way as your Will.

Your bequest can be in the form of cash, a percentage of your estate, or other assets such as real estate, shares, bonds or items of value.

We also recommend that you consult an accountant, tax advisor or the Australian Tax Office to fully understand the tax implications of your bequest.

TRUSTS AND PRIVATE ANCILLARY FUNDS

If you are the Trustee or Director of a Trust or Private Ancillary Fund (PAF), you might wish to consider making an annual donation to the ASO from the Trust or make the ASO a beneficiary of the Trust. This will enable your initial donation to go further and provide a sustainable, ongoing gift to the ASO.

DEDUCTIBLE GIFT RECIPIENT STATUS

The Adelaide Symphony Orchestra Pty Ltd Appeal Fund (ABN 49 079 016 738) holds Deductible Gift Recipient (DGR) Status, is fully Tax Exempt and a Registered Charity.

KEEP US INFORMED

Please let us know if you have chosen to leave a gift to the Adelaide Symphony Orchestra in your Will. This ensures that we can properly thank you and acknowledge your bequest during your lifetime, although you can certainly choose to remain anonymous. Once you have notified us of your gift you will be invited to join the ASO's Grainger Circle. Notifying us of your intention does not commit you to a particular course of action or limit your freedom to change your Will in the future. It is simply a statement of your present intentions.





Grainger Circle

To recognise the important role gifts in Wills play in the life of the orchestra, bequestors are invited to join the Grainger Circle, comprised of like-minded individuals who have chosen to leave a gift to the ASO in their Wills. Its purpose is twofold: to give us the invaluable opportunity to acknowledge and honour bequest donors during their lifetime; and to give potential and existing bequest donors a unique opportunity to develop a closer relationship with the orchestra.

To become a member of the Grainger Circle you simply need to let us know that you have remembered Adelaide Symphony Orchestra in your Will. There are no membership or administration fees. Members are invited to exclusive events and receive the ASO's donor newsletter, *Grace Notes*. The ASO acknowledges bequests in Annual Reports and Donor Impact Reports, unless donors wish to remain anonymous.

Grainger Circle Membership Form

To become a member of the Grainger Circle you simply need to let us know that you have remembered the ASO in your Will.

☐ I have included a bequest to the ASO in my Will

☐ Please find below specific details of the gift in my Will:

OR

☐ Enclosed is a copy of the relevant section of my Will

☐ Enclosed is a letter of confirmation from my solicitor

☐ I wish for my bequest to remain anonymous

☐ I wish for my bequest to be recognised with the name:

The ASO acknowledges bequests in the Annual Report and Donor Impact Report in the year they are received, unless benefactors wish to remain anonymous.

MY DETAILS

☐Mr ☐Mrs ☐Ms ☐Miss ☐other...

Name

Address

Postcode

State

Contact No.

Email

MY SOLICITOR'S DETAILS

Name

Law Firm

Address

Postcode

State

Contact No.

Email

Date received (Office Use Only) ____ / ____ / ____

Wording Your Bequest

- As a guide, the most common types of gifts include:
- A residual gift: The remainder of your Estate after your loved ones have been cared for
 - A percentage gift: A percentage of either the residue or the entire estate
 - A pecuniary gift: A specific sum of money
 - An asset gift: Real estate, shares, bonds or other particular items of value.

The best way to arrange leaving a gift to Adelaide Symphony Orchestra is to discuss your wishes with your family first and speak with a solicitor to either create or update your Will.

A solicitor can ensure that your estate is distributed in a way that meets your wishes. The following four wording options may be used in consultation with your lawyer:

I give to the Adelaide Symphony Orchestra Pty Ltd Appeal Fund ABN 49 079 016 738 free of all duties and taxes including, if any, Capital Gains Tax (CGT)

1. *All my residuary estate*
2. *_____ % percentage of my Estate or _____ % of the residue of my Estate*
3. *The sum of \$ _____*
4. *List of _____ (specified asset or assets)*

and declare that a receipt from the Managing Director or other authorised officer will be sufficient discharge of my executor's duty.



FURTHER INFORMATION

If you need assistance with any aspect of leaving a gift in your Will or would like to discuss bequests confidentially with an ASO staff member, please contact Annemarie Kohn, the ASO's Senior Manager, Development.

Adelaide Symphony Orchestra Pty Ltd Appeal Fund
ABN 49 079 016 738
91 Hindley Street, Adelaide, 5000
08 8233 6233



INSPIRING BEQUESTS

Donald and Rhonda Gilmour first starting attending concerts in their school years, and one of their first orchestral experiences together was going to the ballet for Donald's 18th birthday. Rhonda's mother made her a dress especially for the occasion.

Now almost 70 years later, Donald and Rhonda are still regular concert attendees, ASO donors and members of the Grainger Circle.

Donald and Rhonda agree that "one of the great things about the ASO is their versatility". Rhonda recalled a conversation with her 18 year old neighbour, when he warned her that he would be having a loud party that evening. Rhonda retorted, "It's hardly going to worry me – last night I went to a Led Zeppelin concert with the ASO!"

When asked why they have each chosen to leave a bequest to the orchestra, Rhonda said, "It's important to support the arts, because we believe music, art and theatre humanise society. If we expect to have these things, and value them, we must support them."



PHILANTHROPY CODE OF CONDUCT

The following code of conduct will be used to guide Adelaide Symphony Orchestra's philanthropy programs

- Adelaide Symphony Orchestra is committed to high standards of behaviour and working principles of excellence, passion, bravery and community.
- The ASO works in the best interest of the donor, and a gift will only be considered if it is in the financial interest of the donor and their family.
- All donors are advised to seek independent counsel from their own solicitor, accountant, tax advisor or the Public Trustee in their state or territory before including the ASO in their Will.
- The ASO will accept gifts of cash, a percentage of an estate, or other assets such as real estate, shares, bonds or items of value, at their discretion. Please contact the ASO if you would like a copy of their Gift Acceptance Policy for further information.
- All gifts including bequests received by the ASO will be used to support the ASO's stated mission and purposes. If a gift has been made for a specific purpose only, the ASO will accept the gift at their discretion in accordance with the Gift Acceptance Policy.
- The ASO respects the privacy of its donors and all information will be kept confidential unless permission is received to release the information.
- All decisions relating to the investment of bequest funds are under the control of the ASO Board of Directors, except where an independent trustee has been nominated.

