



WALNUT STREET THEATRE



Protecting the Eternal Flame Today,
for the Theatre of Tomorrow

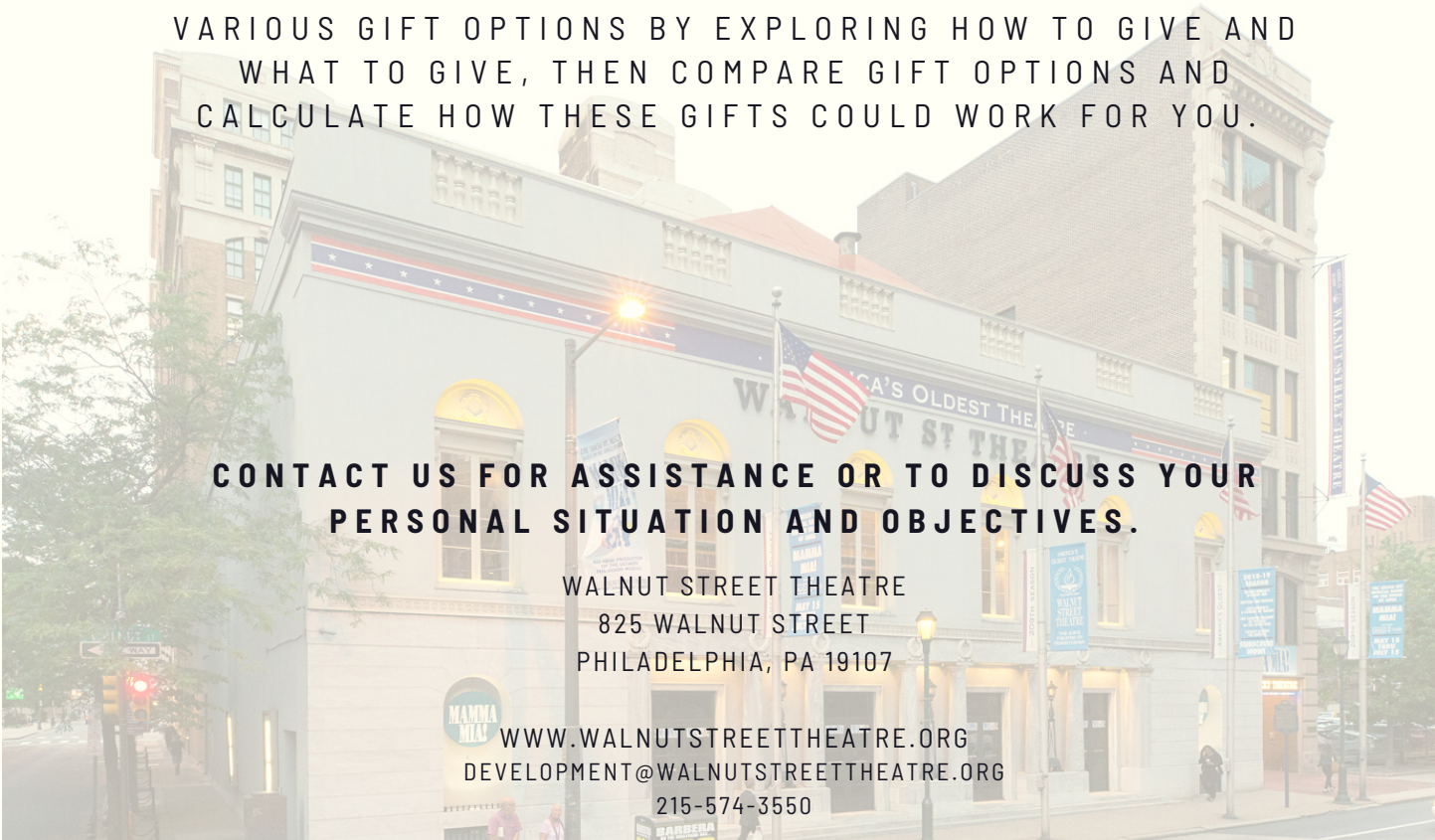
Your planned gift has a profound effect on Walnut Street Theatre's future and can directly support scholarship opportunities for aspiring artists in the Theatre School, foster the next generation of theatregoers by creating accessible arts education programs for underserved schools, and ensure that the lights will be on for hundreds of thousands of individuals across many generations of Philadelphians who will laugh, cry, and stand up in their seats during curtain calls at the Walnut.

WE RECOMMEND THAT YOU FAMILIARIZE YOURSELF WITH VARIOUS GIFT OPTIONS BY EXPLORING HOW TO GIVE AND WHAT TO GIVE, THEN COMPARE GIFT OPTIONS AND CALCULATE HOW THESE GIFTS COULD WORK FOR YOU.

CONTACT US FOR ASSISTANCE OR TO DISCUSS YOUR PERSONAL SITUATION AND OBJECTIVES.

WALNUT STREET THEATRE
825 WALNUT STREET
PHILADELPHIA, PA 19107

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215-574-3550



Making a planned gift is a wonderful way to show your support and appreciation for Walnut Street Theatre and our mission, while accommodating your own personal, financial, estate-planning, and philanthropic goals.

Gifts by Will

A gift in your will is the most popular way to leave your lasting legacy at WST for years to come. You may prefer to state in your will or trust a sum of money or a percentage of estate, which is not subject to federal estate taxes - therefore reducing the tax burden of an estate. This can be changed or added at any time.

Including WST can be as simple as adding a codicil, or addendum, with sample text outlined below, and the Walnut Street Theatre Tax ID #23-1715152:

Gifts by IRA Rollover

If you are 70 1/2 or older, you can instruct your IRA plan administrator to make direct transfers to Walnut Street Theatre. The amount transferred counts toward your mandatory distribution if you have attained the age for required distributions (73 years old). These cannot exceed \$100,000 (adjusted annually for inflation), and do not receive income-tax deduction as they are not included in gross income.

Gifts of Assets

Another simple way to support WST with a legacy gift is through creative gifts of assets, including stocks, bond and property. You can instruct your broker to make transfers from your account or make note of this in your will. You can also designate WST as a beneficiary of your retirement plan benefits.

Gifts of tangible personal property, with potential related use to the theatre, or resale value, are also entitled to charitable deduction. Please contact the Walnut prior to dedicating these in your estate planning to discuss the type of property and getting an appraisal.

Life Insurance

Life insurance can be the direct funding medium for a gift, permitting you to make a substantial gift (face value of the policy) for a modest annual outlay (the premium payment). You can assign all the rights in your insurance policy to Walnut Street Theatre, designate us an irrevocable beneficiary and then receive an income-tax deduction. If premiums remain to be paid, you can receive income-tax deductions for contribution to WST to pay these premiums. Upon death, WST may surrender the policy for its cash value or hold it and receive the proceeds.

Charitable Remainder or Lead Trust

Creating a trust agreement and transferring cash or property to a trustee allows you to make annual payments to the Walnut, while also providing the remainder to your heirs. Walnut Street Theatre accepts both designation as remainder beneficiary (CRT) or income beneficiary (CLT). WST will only accept designation as a trustee of a CRT if receiving 50% or more of the interest.

Bequest Language

I give, devise, and bequeath the sum of \$____ or a percentage ____% of my residuary estate to Walnut Street Theatre, with offices at 825 Walnut Street, Philadelphia, PA 19107, for the benefit of the area of greatest need.

This information is not intended as tax, legal or financial advice.

Please consult your personal financial advisor or attorney for specific information regarding your intended gift.