

## Leave a Gift in Your Will – Leave a Musical Legacy

Thank you for wanting to continue to make a difference to music for years to come by leaving a gift in your Will to Melbourne Symphony Orchestra. Making a bequest is easy and there are many options to choose from that best meet your needs and respect your wishes.

### Some common bequests are:

- **Residuary bequest:** after providing for your loved ones, you can nominate that the whole, or a specified percentage, of the remainder (known as the residue) of your estate be gifted to Melbourne Symphony Orchestra. As there is no fixed dollar amount stated, a residuary bequest prevents inflation from reducing the 'real value' of your gift.
- **Dollar amount:** you may nominate an exact dollar amount to gift to the MSO.
- **Pecuniary bequest:** this can be a specific gift such as property, possessions, insurance policies or shares that is clearly distinguishable and separate from the remainder of the property that forms your estate.
- **Life interest bequest:** your Will may give a particular person use of an asset, such as property or invested funds, for the duration of their life. Upon their death, the asset can be passed on to the MSO as your nominated end beneficiary.

### Planning Your Legacy

With the help of an attorney, you can include language in your Will or trust specifying a gift to be made to family, friends or the MSO as part of your estate plan.

### Some sample language you can use when leaving a gift in your Will to the MSO:

*I, (insert name), give, devise and bequeath... [select the appropriate option below]*

1. **the whole of my estate**
2. **[insert number] % of my estate**
3. **the residue of my estate**
4. **[insert number] % of the residue of my estate**
5. **The sum of \$ [insert value of your gift]**
6. **[insert number] of my [insert name of shares] shares**

*to Melbourne Symphony Orchestra (ABN 47 078 925 658) of ABC Southbank Centre, 120-130 Southbank Boulevard, Southbank, Victoria 3006, free of all claims, for its general purposes, and the receipt given on behalf of Melbourne Symphony Orchestra shall be a full and sufficient discharge to my executor.*

### How you can direct a gift in your Will to Melbourne Symphony Orchestra

The two most popular options are to leave a bequest to the MSO for general purposes or to education. If you have a more specific gift in mind, please consult a member of the MSO Philanthropy team, who can help ensure your expectations can be met and your gift put to its intended use.

### **What happens to your gift?**

When the MSO receives a distribution from an estate, that money goes into our endowment. Instead of utilising the money right away, your gift will build the principal of the endowment, the yearly earnings of which the MSO can make use of – for general purposes, that means where it's needed most – musician salaries, instruments, regional touring, etc. If you are passionate about music education, your gift will help fund MSO education initiatives – like Jams for Juniors, The Pizzicato Effect and student subscriptions.

A gift in your Will to Melbourne Symphony Orchestra is truly leaving a legacy of wonderful music to the community. Through the endowment, your bequest will last in perpetuity – meaning you can continue to be a part of your favourite orchestra for years to come.

### **Conductor's Circle**

If you do choose to leave a gift in your Will to the MSO, please let us know. Not only can we ensure we respect your wishes, we can also better plan for the future if you share the relevant portion of your Will, and we can recognise your extraordinary commitment to the orchestra immediately through our Conductor's Circle. Conductor's Circle members are listed in MSO concert programs and the annual report (you can also choose to be anonymous), and are invited to events throughout the year – from interval drinks to a special annual Conductor's Circle event.

It's thanks to members of our community like you that the MSO is not only Australia's oldest orchestra, but also one of the top 20 orchestras in the world. We would love to welcome you further into our family of musicians and music lovers. Please be in touch should you have any questions or need additional information.

### **Contact Us**

MSO Philanthropy  
(03) 8646 1551  
[philanthropy@mso.com.au](mailto:philanthropy@mso.com.au)



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# Melbourne Symphony Orchestra

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**I WISH TO ADVISE YOU THAT A GIFT TO THE MELBOURNE SYMPHONY ORCHESTRA IS INCLUDED IN MY WILL**

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Kindly ensure we have your details below correct.

**Name (Mr/Mrs/Ms/Dr/other)**

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**Address**

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**Email address**

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**Phone**

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**Mobile**

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**Date of birth**

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**RECOGNITION AND COMMUNICATION**

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By making arrangements in your Will for a gift to the MSO, you are already eligible to be a member of the honorary Conductor's Circle. Your membership gives us the opportunity to acknowledge, inform and involve you with your Orchestra.

I would like to become a member of the MSO Conductor's Circle

Please indicate how you would like your name to appear on our published honour rolls:

As above     Anonymous     Other \_\_\_\_\_

I would prefer not to be included in the MSO Conductor's Circle

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**CONTACT DETAILS**

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Please provide us with the details of your solicitor and/or executor of your estate:

**Name / Firm**

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**Address**

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**Phone**

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We understand this information is provided in good faith however details may alter if your circumstances change.

I confirm that the information I have provided is true and accurate at the date of signing this document.

**Signature**

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**Date**

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**THANK YOU**

**Please return this form to:**

Melbourne Symphony Orchestra  
Philanthropy Department  
GPO Box 9994 Melbourne VIC 3000  
Phone (0) 3 8626 1551  
Email [philanthropy@mso.com.au](mailto:philanthropy@mso.com.au)