



THE CRAIG NOEL
L E G A C Y
SOCIETY

The Old Globe is purpose-driven, serving a vibrant community through the delivery of thrilling theatre art as a public good.

Thank you for your interest in creating a legacy gift in support of The Old Globe. An estate gift, designed any number of ways, will ensure a stronger and brighter future for the Globe and for all of San Diego.

If you have already made, or wish to make a planned gift, please complete this confidential form and return it to Bridget Cantu Wear at bcantuwear@theoldglobe.org or mail to:

The Old Globe
P.O. Box 122171
San Diego, CA 92112-2107

Name(s): _____

Address: _____

City: _____ State: _____ Zip: _____

Home Phone: _____ Office: _____ Cell: _____

Email: _____

Creating a Legacy Gift

- I/We have included The Old Globe in my/our estate plan and are pleased to confirm the following gift:

- I/We wish to include The Old Globe in my/our estate plan
- We are pleased to detail our bequest and help The Old Globe plan for its future. P
- Please know that I/we have named The Old Globe as a beneficiary in one or more of the following planned giving vehicles:
 - ___ Will/Bequest (Stated as ___% or Specific Amount: \$_____ or Residual: \$_____ (optional)
 - ___ Life Insurance Policy
 - ___ Donor-Advised Fund
 - ___ Investment Account
 - ___ Pooled Income Fund
 - ___ Beneficiary Designation:
 - ___ Retirement Account ___ Annuity
 - ___ Charitable Gift Annuity ___ Charitable Remainder Trust
 - ___ Other (please specify): _____
 - ___ IRA, Pension, or other retirement acct.
- Estimated value of gift: _____ (optional)

(I understand this information is completely confidential.)

Designating a Legacy Gift

Your legacy gift may be designated to fund the Globe's Endowment, where the initial gift will live on into perpetuity. Depending on the size of the gift you may name a Special Fund which will be restricted to that purpose only. Or you may specify that your gift will go to the annual fund and spent in the year it is received. If your gift is \$250,000 or more, you may consider designating your gift to support any of the following areas:

- General Fund – An unrestricted gift will fund the greatest need as determined
- Endowment Fund – An unrestricted or restricted gift to fund a specific program or
- Artistic Enhancement Fund – An unrestricted or restricted gift to benefit artistic programming, determined by the Artistic Director and Board of Directors
- Cash Reserve Fund – Restricted to immediate needs and to address non budgeted critical expenses
- Other areas of interest not listed above _____

Recognizing a Legacy Gift

We would like to acknowledge your legacy gift and include you in the *Craig Noel Legacy Society*. By including your name in the Society, you will inspire others to follow your generosity and dedication.

As a member of the Craig Noel Legacy Society, and with your permission, we will publish your name in the *Performances Magazine*, on lobby digital screens of two theatres and in the Lipinsky VIP Suite. You will also be invited to the Annual Stewardship Luncheon, the Annual Meeting and additional events held throughout the year to meet the actors and artists of The Old Globe, plus more!

- The name(s) on all listings for publication should read as follows:

- I/We wish to remain anonymous.

My stated desire to include The Old Globe in my estate plan is not a legally binding obligation. However, it is my/our wish and intention to fulfill this bequest, and without knowing the future and my circumstances, I/we do not have any intention to change my/our minds.

Donor's Signature: _____ Date: _____

Joint Donor's Signature: _____ Date: _____

Please call Bridget Cantu Wear at (619) 684-4144 if you have any questions or need more information about creating a legacy gift to The Old Globe. We appreciate you and look forward to welcoming you into the Craig Noel Legacy Society!

Bridget Cantu Wear
Associate Director of Development
Office of Planned Giving and Endowment Campaign
(619) 684-4144 | bcantuwear@theoldglobe.org