



LEAVING A BEQUEST

AND

THE GRAINGER CIRCLE PROGRAM



ADELAIDE SYMPHONY ORCHESTRA

The Adelaide Symphony Orchestra is the largest performing arts organisation in South Australia, giving approximately 100 performances covering diverse musical styles to an audience of over 100,000 people every year.

In addition to our own program, the ASO is a key contributor to the arts in South Australia, collaborating yearly with State Opera of South Australia, The Australian Ballet and the Adelaide Festival of the Arts, as well as many touring acts. In recent years the ASO has also performed with WOMADelaide, OzAsia Festival, Adelaide Cabaret Festival, Adelaide Guitar Festival, State Theatre Company, South Australian Museum and the Bendigo International Festival of Exploratory Music.

The ASO is recognised as a great orchestra, one that South Australia should be very proud of – a 'blind' listening test by *Limelight* magazine rated the ASO as second only to the much larger Sydney Symphony Orchestra; visiting international conductors and soloists shower praise over the calibre of the ASO.

In 2021 the ASO will celebrate 85 years of bringing orchestral music to the people of South Australia. Our longevity has only been possible through the support of donors who value what we do, and who share a passion for keeping orchestral music a major part of the cultural fabric of this city.

Great cities need great orchestras, and we invite you to consider making a bequest to the Adelaide Symphony Orchestra, to invest in the next 85 years and beyond. Help us inspire the next generations and ensure orchestral music continues to thrive in South Australia.



MAKING A BEQUEST TO THE ADELAIDE SYMPHONY ORCHESTRA

Leaving a gift in your will is a very special way to support the causes closest to your heart. The Adelaide Symphony Orchestra considers it an enormous privilege to be recognised through your bequest. We recognise that your contribution becomes your legacy to both your family and to the wider community.

As these gifts are so important to the ASO, we regard all those who notify us of their intended bequest among our most valued patrons. Your future support will enable us to keep inspiring others with the best orchestral music, in the same way that our music has inspired you.

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 to where the funds are needed most, to help us continue our mission.

If you would like to leave a bequest 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 if you so choose.

WORDING YOUR BEQUEST

It is easy to include a charity in your will and we have provided suggested wording below to take to your solicitor should you consider the ASO in your final wishes. We encourage you to talk to your family before you finalise your arrangements with a solicitor.

For the purposes of a will, our legal name is Adelaide Symphony Orchestra Pty Ltd Appeal Fund (ABN 49 079 016 738).

"I give to the Adelaide Symphony Orchestra Pty Ltd Appeal Fund [the sum of \$.../...% of my estate/...% of the rest and residue of my estate] to be used for its general purposes. A receipt from the Managing Director or other authorised officer will be sufficient discharge to my executors or trustees."



LEGAL AND TAX ADVICE

We recommend that you seek legal advice when making a will from a lawyer or The Public Trustee in your state or territory. If you already have a will and wish to add the 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 (ato.gov.au).

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 for the ASO for many years to come.

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 gift during your lifetime, though you can certainly choose to remain anonymous. Once you have notified us of your gift you will be invited to join our Grainger Circle.

THE GRAINGER CIRCLE

The Grainger Circle is comprised of like-minded individuals who are all leaving a gift to the ASO in their will. They believe in the importance of live orchestral music and value the ASO's contribution to South Australia.

Grainger Circle members are invited to a number of exclusive events a year, where they have the opportunity to meet with musicians, conductors, and the Board and senior management of the ASO. They also receive our donor newsletter, *Grace Notes*.



CONTACT

For further information, please contact:

Annemarie Kohn

Senior Manager Development
Adelaide Symphony Orchestra
GPO Box 2121
ADELAIDE SA 5001
Phone: (08) 8233 6263
Email: kohna@aso.com.au



PHILANTHROPY CODE OF CONDUCT

The following code of conduct is used to guide the Adelaide Symphony Orchestra's philanthropy programs:

- The 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 our 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.



BEQUEST FORM

Please complete this form and return in the enclosed Reply Paid envelope. All information provided will remain confidential.

- I have included a bequest to the Adelaide Symphony Orchestra in my will.
- Please find below specific details of the gift in my will to the ASO (or enclosed):

.....

.....

.....

.....

.....

.....

.....

- My details:

Name:

Address:

State:..... Postcode:.....

Telephone: Mobile:

Email:

- My solicitor's details:

Name:

Address:

State:..... Postcode:.....

Telephone: Mobile:

Email:

Date Received (Office Use Only): __ / __ / __