



**OPERA ORLANDO**

Where the City goes for Opera



the

# LEGACY SOCIETY

your guide to planned giving



audience from *All Is Calm: the Christmas Truce of 1914* | December 2022 | Steinmetz Hall



Opera sings to every heart, connecting us to our history, our humanity, and our community. It is **Opera Orlando**'s privilege and responsibility to carry on opera's legacy that dates back to the turn of the 17th century.

Throughout opera's history, the art form has flourished thanks to the patronage of individuals and philanthropists who recognize the value of the arts in society and want to share their love and appreciation with others. Indeed, it falls to citizens to create a base of support from which the arts can flourish from generation to generation.

Central Florida has enjoyed a wonderful legacy of operatic performances and programs for more than 60 years and it is **Opera Orlando**'s goal to continue to celebrate, expand, and share the beauty and splendor of the greatest of all art forms with audiences new and old alike. To achieve this **Opera Orlando** relies year-to-year on an annual fund campaign for general support. Endowed funds, however, allow the organization to have an even more secure funding source to support the core components of the Company's mission: high-quality performances, education programming, and community engagement initiatives.

In 2022, **Opera Orlando** fulfilled its five-year strategic plan by successfully transitioning its MainStage series from the 300 seat Alexis and Jim Pugh Theater to the newly opened and acoustically ideal, 1300 seat Steinmetz Hall. The Company more than doubled its audience while also doubling its annual budget and expanding cash reserves.

In fewer than ten years, **Opera Orlando** has grown into a cultural resource for Central Florida, building local, regional, national, and international partnerships that bring distinction to the Company, the region, and the state.

YOU ARE INVITED

Please consider joining the **Opera Orlando Legacy Society** by making a gift to the **Opera Orlando Endowment Fund**. Your support of the endowment today helps secure the strength and vitality of **Opera Orlando** and its place in the arts of Central Florida for generations to come.

**Opera Orlando** is quickly securing its place as a major regional opera company. It is drawing global attention with its innovative programming, and as **Opera Orlando** continues to grow and develop more challenging artistic initiatives, so too is the Opera's increasing need for a larger and growing endowment fund.



*Rigoletto* | April 2022 | Steinmetz Hall



*The Magic Flute* | December 2022 | Steinmetz Hall



*Bella Nozze at Bella Collina* | March 2023 | Bella Collina



*All Is Calm: The Christmas Truce of 1914*  
December 2022 | Steinmetz Hall

# THE GOAL

To further **Opera Orlando's** mission and vision, a goal of raising **\$10 million** in direct gifts, pledges, and bequests for the endowment fund by the Opera's tenth anniversary season (2025-26) has been set by the board of directors. This effort will quadruple the current **Opera Orlando Endowment Fund**. The Company is grateful for and acknowledges those who have already made a lasting contribution to opera in Central Florida.

To date, more than **\$2.5 million** has been donated, pledged, and bequeathed to the endowment fund. Both cash gifts and bequests will play an important role in further building the fund, and there are many options to enhance an existing fund or allocation or create a new fund for another designated purpose, tribute, or as a memorial.



*La Traviata* | October 2021 | Walt Disney Theater



*The Daughter of the Regiment* | April 2023 | Steinmetz Hall



*Baseball: a Musical Love Letter*  
May 2023 | Harriett's Orlando Ballet Centre



*The Secret River* (commissioned world premiere)  
December 2021 | Alexis & Jim Pugh Theater

# THE FUND

The **Opera Orlando Endowment Fund** is a separate 501(c)(3) organization governed by its own board of trustees. The role and purpose of the endowment fund is to support the Opera's productions, education programs and initiatives, and other cultural activities. Gifts to the fund provide lasting and secure investments that are permanently restricted. The funds are professionally invested and managed to ensure a balance between risk and performance.

## Opera Orlando Endowment Fund BOARD OF TRUSTEES

Brendan Lynch, *board chair*

- Sherry Bremer
- Linda Landman Gonzalez
- Mark Lowrey
- Gabriel Preisser
- Carol Stuckey
- David Treitel

# YOUR GIFT

Remembering **Opera Orlando** in your estate plans is a thoughtful way to be a part of the Opera's enduring legacy. In considering how best to support the **Opera Orlando Endowment Fund**, there are three primary ways to make your gift and multiple variations of each:

## CASH | PLEDGE | BEQUEST

Direct your bequest or charitable planned gift to **Opera Orlando** and be a part of the Company's **Legacy Society**, which includes recognition in each production program book, an invitation to the Opera's annual **Legacy Society** lunch, and other special invitations.



# YOUR SUPPORT

Build on the legacy of enlightened citizens from generations past and secure the future of **Opera Orlando** as a leader in Central Florida's cultural community. A sampling of ways to make a lasting gift to the **Opera Orlando Endowment Fund** are:

- a direct cash gift of any size
- a gift from private or family foundations
- appreciated property (land, real estate)
- low cost base securities (stocks, options, bonds, ETFs, mutual funds)
- remainder interest in a private residence
- charitable lead trusts (charitable lead annuity Trusts or unitrusts)
- charitable remainder trusts
- pooled income funds
- donor advised funds
- deferred gifts, testamentary bequests
- life insurance policies
- qualified charitable distribution (QCD) - directed portion of IRA or Pension required minimum distribution

**Opera Orlando** highly recommends that potential donors to the endowment consult an estate planning professional to help determine the best vehicle for making or structuring their gift.

If preferred, **Opera Orlando** can assist directly in these considerations.

Thank you for considering a gift to the  
**Opera Orlando Endowment Fund** and joining the **Legacy Society**.

For more information contact:

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**OPERAORLANDO** is designated a 501(c)(3) by the Internal Revenue Service.  
The IRS identification number for **Opera Orlando** is 27-0406958.

**OPERAORLANDO ENDOWMENT FUND, INC.** is designated a 501(c)(3) by the Internal Revenue Service.  
The IRS identification number for **Opera Orlando Endowment Fund** is 88-3549270.