18TH ESTATE PLANNING SEMINAR:
WRESTLING WITH YOUR ESTATE PLANS

Leave Your Legacy

Share your passion for the Goodman with future generations by joining the Spotlight Society, a group of donors who have designated a gift to the theater in their estate plan.

YOUR GIFT MATTERS

We understand that the decision to designate a planned gift is one of the most personal investments you can make and we appreciate your commitment to enriching lives through the theater arts. Planned gifts of all sizes are integral to the success of the Goodman's productions and programming. Your legacy will provide permanent resources and support a range of artistic, educational, and operational initiatives such as:

- General Operations
- New Work Development Programs
- Education and Engagement Programs
- Accessibility Programs

BENEFITS OF MEMBERSHIP*

- Invitations for you and a guest to behind-the-scenes events as they occur throughout the season.
- Access to priority subscription renewals, complimentary ticket exchanges and to purchase house seats
- One complimentary evening each season for up to six guests in the Goodman Lounge with drinks and light snacks. (reservation required)
- Opportunities to learn more about estate planning and the newest tax laws from the Goodman's Advisory Council.
- Recognition as a member of the Spotlight Society in *Playbill* throughout each season; on the Spotlight Donor Wall in the Goodman lobby and on the Goodman website.

* All items are reflective of the current environment due to COVID-19 and some restrictions may apply

For more information about the Spotlight Society, please contact Marty Grochala at **312.443.3811 ext. 597** or **MartyGrochala@GoodmanTheatre.org.**

Ways to Give

Planned and annual gifts have greatly contributed to the Goodman's history of artistic excellence. Listed below are just some of the charitable giving options available. Thank you for your generosity and consideration.

TAX ID
The Goodman's federal tax identification number is 36-2896025.

CASH
Gifts of cash to the Goodman entitle you to an income tax charitable deduction of the full value of the gift up to 50% of your adjusted gross income in the year you make the gift. If the deduction exceeds your 50% allowance, you may carry forward the additional value for as many as five or more years, and take the deduction over time.

STOCK
To make a gift of stock to Goodman Theatre, please follow these instructions. Your broker needs authorization to transfer to our broker, Northern Trust Securities, Inc., on your behalf as follows: via DTC #0226

Goodman Theatre, account #NT2-047988
Northern Trust Securities, Inc.
National Financial Services
200 Seaport Blvd., Z2P
Boston, MA 02210

Please provide Goodman Theatre with a note or a call detailing the gift, including the name of the donor, the name of the stock, the number of shares, and the date of transfer. We will send a receipt soon after the stock is sold. As per IRS rules, stock gifts are valued using the average market price on the date the DTC transfer is completed.

PLANNED GIFTS
Planned gifts are committed during an individual's lifetime and take effect posthumously. There are various giving vehicles including a bequest in a will or trust, beneficiary designation through a retirement account or life insurance policy. If you are interested in designating a gift of this nature, please use the following language: **"I hereby give and bequeath to the Goodman Theatre, incorporated as Chicago Theatre Group, Inc., a not-for-profit corporation in Chicago, Illinois [specific amount, percentage of estate, or specific property] designated for [General Purposes, New Work Development, Education and Engagement or Accessibility programs]."**

BEQUESTS
A provision in your will or trust document that directs a portion of your estate to a named beneficiary (such as the Goodman) is called a bequest. A charitable bequest not only furthers your lifetime commitment to Goodman Theatre, but also qualifies your estate for a charitable deduction that can reduce estate tax liability. There are several ways to make a bequest: you can leave a specific monetary amount; you can leave a specific piece of property or you can leave a percentage of your estate.

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THEATRE
GOODMAN
SPOTLIGHT SOCIETY

Estate Planning Worksheet: Personal Information

GOODMAN THEATRE SPOTLIGHT SOCIETY

Periodically review this information to ensure it is up to date. Provide copies to applicable parties.

TODAY'S DATE: _________________

PRIMARY PERSON:

NAME

OCCUPATION

DATE OF BIRTH

CITIZENSHIP

EDUCATION

PRIMARY RESIDENCE

HOME PHONE | HOME FAX

WORK PHONE | WORK FAX

EMAIL | WORK EMAIL

SPOUSE/SIGNIFICANT OTHER:

NAME

OCCUPATION

DATE OF BIRTH

CITIZENSHIP

EDUCATION

WORK PHONE | WORK FAX

EMAIL | WORK EMAIL

Personal and Professional Contacts

FAMILY MEMBER

	NAME	PHONE NUMBER	EMAIL

FAMILY MEMBER

	NAME	PHONE NUMBER	EMAIL

FRIEND

	NAME	PHONE NUMBER	EMAIL

FRIEND

	NAME	PHONE NUMBER	EMAIL

PRIMARY CARE PHYSICIAN

	NAME	PHONE NUMBER	EMAIL

PEDIATRICIAN

	NAME	PHONE NUMBER	EMAIL

GUARDIAN FOR MINORS

	NAME	PHONE NUMBER	EMAIL

PRIMARY MEDICAL INSURANCE

	NAME	PHONE NUMBER	EMAIL

FINANCIAL ADVISOR

	NAME	PHONE NUMBER	EMAIL

ATTORNEY

	NAME	PHONE NUMBER	EMAIL

EXECUTOR

	NAME	PHONE NUMBER	EMAIL

POWER OF ATTORNEY

	NAME	PHONE NUMBER	EMAIL

ACCOUNTANT

	NAME	PHONE NUMBER	EMAIL

DENTIST

	NAME	PHONE NUMBER	EMAIL

VETERNARIAN

	NAME	PHONE NUMBER	EMAIL

TELEPHONE/CELL PHONE PROVIDER

	NAME	PHONE NUMBER	EMAIL

CABLE PROVIDER

	NAME	PHONE NUMBER	EMAIL

GAS COMPANY

	NAME	PHONE NUMBER	EMAIL

ELECTRIC COMPANY

	NAME	PHONE NUMBER	EMAIL

Personal Information (Continued)

CHILDREN/DEPENDENTS:

NAME	DATE OF BIRTH	CONTACT NUMBER
NAME	DATE OF BIRTH	CONTACT NUMBER
NAME	DATE OF BIRTH	CONTACT NUMBER
NAME	DATE OF BIRTH	CONTACT NUMBER
NAME	DATE OF BIRTH	CONTACT NUMBER
NAME	DATE OF BIRTH	CONTACT NUMBER
NAME	DATE OF BIRTH	CONTACT NUMBER
NAME	DATE OF BIRTH	CONTACT NUMBER

GRANDCHILDREN:

NAME	DATE OF BIRTH	NAME	DATE OF BIRTH
NAME	DATE OF BIRTH	NAME	DATE OF BIRTH
NAME	DATE OF BIRTH	NAME	DATE OF BIRTH
NAME	DATE OF BIRTH	NAME	DATE OF BIRTH
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NAME	DATE OF BIRTH	NAME	DATE OF BIRTH
NAME	DATE OF BIRTH	NAME	DATE OF BIRTH
NAME	DATE OF BIRTH	NAME	DATE OF BIRTH

Personal Information (Continued)

OTHER (EXTENDED FAMILY/FRIENDS, EMERGENCY CONTACTS)

NAME	DATE OF BIRTH	CONTACT NUMBER	RELATIONSHIP
NAME	DATE OF BIRTH	CONTACT NUMBER	RELATIONSHIP
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NAME	DATE OF BIRTH	CONTACT NUMBER	RELATIONSHIP

Letter of Instruction

Take the time to draft clear instructions to ensure your loved ones have adequate guidance. Making essential decisions and crafting plans may be even more difficult to address under stressful circumstances.

How would you like the following items to be handled?

PEOPLE TO NOTIFY

IMMEDIATE CASH NEEDS

FUNERAL ARRANGEMENTS

OTHER (BUSINESS ARRANGEMENTS, HEIRLOOMS, REAL ESTATE, INSURANCE PROCEEDS)

NOTES

PERSONAL DOCUMENTS

DOCUMENT	DATE LAST UPDATED	LOCATION/NOTES
Birth Certificate		
Citizenship Papers		
Divorce Papers		
Document Appointing Children's Guardian		
Driver's License Number and Expiration Date		
Education Records		
Employment Records		
Health Care Directive		
Health Info (Vaccinations, Hospitalizations)		
List of Professional & Fraternal Organization Memberships		
Marriage Agreements (Pre- or Post-Nuptial)		
Marriage Certificate		
Military Records		
Other, e.g. Adoption Papers		
Passport		
Pet Registration & Records		
Power of Attorney		
Safe and Combination		
Safe Deposit Box and Key		
Social Security Card		

PROFESSIONAL/SMALL BUSINESS AND RETIREMENT DOCUMENTS

DOCUMENT	DATE LAST UPDATED	LOCATION/NOTES
Bank Account Statements		
Beneficiary Forms for IRAs, 401 (k)s or Other Benefit Plans		

Beneficiary Forms or Annuity Policies		
Buy Sell Documents		
Company Retirement Plan Statements from all Employers		
Corporate Documents		
Deferred Compensation		
Employee, Payroll and Retirement Records		
Financing Papers and Credit Card Statements		
Inventory of Business Assets		
IRA Statements		
Other Employee Retirement Benefits (e.g. Nonqualified Deferred Compensation)		
Partnership/LLC Documents		
Stock Options or Employee Benefits		

ESTATE PLANS

DOCUMENT	DATE LAST UPDATED	LOCATION/NOTES
Cemetery Plot Deed		
Funeral Arrangements and Burial Information		
Funeral Home Preference and Information		
Letter of Instruction to Executor		
Living WillI		
Original Will or Living Trust Documents (Self) Dated		
Original Will or Living Trust Documents (Spouse/Partner) Dated		
Prepaid Burial or Cremation Papers		
Special Estate Instructions — Video		
Special Estate Instructions — Written		

TAX RETURNS AND RECORDS

DOCUMENT	DATE LAST UPDATED	LOCATION/NOTES
Gift Tax Returns		
Income Tax Returns (Last 3 Years)		
Federal/State Gift Tax Returns		
Property and School Tax Records		
Records Re: Tax Basis of Property		

INSURANCE POLICIES

DOCUMENT	DATE LAST UPDATED	LOCATION/NOTES
Automobile Company Policy		
Beneficiary Forms for Insurance Policies		
Dental Company Policy		
Disability Company Policy		
Health/Medical Company Policy		
Life Insurance — Group Company Policy		
Life Insurance — Individual(s) Company Policy		
Life Insurance — Survivorship Company Policy		
Long-Term Care Company Policy		
Mortgage Insurance Policies		
Other, e.g. Veterans Administration Insurance Policy		
Property/Casualty Company Policy		

FINANCIAL PAPERS

DOCUMENT	DATE LAST UPDATED	LOCATION/NOTES
529 College Savings Plan Statements		
Alternative Investments (e.g. K-1s)		
Bearer Bonds Not Held in Account		
Bonds		
Brokerage Account Statements		
Certificates of Deposit		
Charitable Donation References		
Charitable Trust Account		
Checkbook		
Checking Accounts		
Credit Card Accounts		
Credit Union Account Book or Statements		
Equity Compensation (Stock Options, Restricted Stock Agreements)		
Home Equity Line Papers		
Investment Accounts		
Loan Statements		
Loan Payment Books		
Money Market Account or Statements		
Mortgage/Lease		
Mutual Fund Accounts		
Online Bill Pay Information		
Promissory Notes or Other Outstanding Loans		
Savings Account		
Stock Certificates		
Trust (Personal) Accountant		

Trust Documents		
Vehicle Loan		

PROPERTY PAPERS

DOCUMENT	DATE LAST UPDATED	LOCATION/NOTES
Affidavits Re: Community Property		
Affidavits Re: Domicile		
Affidavits Re: Separate Property		
Boat Ownership Records		
Copyrights and Patents		
Guarantees and Warranties		
Home Improvement Papers		
Important Receipts		
Original Deeds to Real Property		
Vehicle Titles		

OTHER

DOCUMENT	DATE LAST UPDATED	LOCATION/NOTES
Loaned Jewelry/Coveted Belongings		
Loans Payable		
Loans Receivable		
Location/Notes of Important Passwords & PINs (i.e. Debit Card, Alarm, Email)		

Digital Information

COMPREHENSIVE PASSWORD/PIN DOCUMENT

LOCATION	LAST UPDATED

PERTINENT ACCOUNT PASSWORDS AND PINS

ACCOUNT	WEBSITE	USER NAME	PASSWORD/PIN
Example: Email	Gmail.com	Tim45	MainStreet7!

Inventory

CREDIT CARD INVENTORY

ISSUER	CARD NUMBER	EXP.	CARD HOLDER	CREDIT LIMIT

SAFETY DEPOSIT BOX INVENTORY (IF NECESSARY, BOX COMBINATION)

LOCATION	
LOCATION OF KEYS	

CONTENTS	NOTES

Appraisal and Inventory of Valuable Items

ITEM	COST/PRESENT VALUE	LOCATION/NOTES

Notes