

# JOIN THE LAKEWOOD SPOTLIGHT SOCIETY!



## ESTATE PLAN ANNUAL TUNE-UP

**Oct. 28, 6:30 - 8:30 PM**

A free estate planning seminar  
(wine & cheese will be served)

Call Carla Rathbun at 503-635-6338 to RSVP.

### ABOUT THE SEMINAR

Laws change, our medical concerns change, our relationships change. Each year, we need to review our estate plans. A great time to do that is before the end of the year.

Lakewood encourages you to attend this free estate planning seminar that will guide you through many decisions as you plan or update what you leave behind - - what will be your legacy? Please note: this is an information only seminar. **No financial products or services will be sold or recommended.**

### ABOUT THE PRESENTERS

**David Avison**, attorney, specializes in estate planning. **Michael Myers** specializes in comprehensive financial planning, retirement income planning, estate preservation, and asset allocation analysis.

### WHAT IS THE SPOTLIGHT SOCIETY

The Spotlight Society is made up those special friends of Lakewood who have included Lakewood in their estate plans.



### WHY JOIN THE SPOTLIGHT SOCIETY?

To help assure that Lakewood continues to inspire and nurture a love of theatre and the arts in our community, we encourage everyone who attends our shows, the Festival of the Arts, and the various classes to remember Lakewood in your estate plans. Simply include Lakewood in your will (or by codicil to your will), or trust; or name Lakewood as a beneficiary of your IRA, 401-K, SEP, annuity or life insurance policy.\* Alert us to this designation and we'll add your name to the Lakewood Spotlight Society.

*Donors are encouraged to consult with their attorney or tax advisor to evaluate how charitable giving can affect their personal situation and offer tax advantages. For your records, please note: The legal name of the Lakewood corporation is Lakewood Theatre Company and our Tax ID number is 93-0700108.*



# JOIN THE LAKEWOOD SPOTLIGHT SOCIETY!

## WHAT IS IT?

The Spotlight Society is made up of those special friends of Lakewood who have included Lakewood in their estate plans.

## HOW TO JOIN

Simply include Lakewood in your will (or by codicil to your will), trust or name Lakewood as a beneficiary of your IRA, 401(k), SEP, annuity or life insurance policy.\* Alert us to this designation and we'll add your name to the Lakewood Spotlight Society.

## DIRECT YOUR GIFT

You may designate your gift to the Lakewood Endowment Fund, for general operations and programs, or simply to Lakewood for use at the discretion of the Board.

*\* Did you know that without proper planning the money in your retirement plan could be taxed as both income and inheritance whereas 100% could go to Lakewood as a beneficiary of your IRA, 401(k) or annuity account - tax free?*

### SPOTLIGHT SOCIETY MEMBERS

Mark Birge	Nancy Headlee
John & Diane Bradshaw	Rocky Johnson
Kathy & David Bussman	Jerry & Marge Koll
Bonnie Conger	Malcolm Mathes
Dee Denton	Chuck O'Leary
Andrew Edwards	Kay Vega
Leonore O. Frankel	Drs. Hugo & Roberta Uhland
Cyndie & Peter Glazer	Bill & Barbara Warner
Mary Jane Headlee	Zandra Winters

## JOIN NOW AND MAKE YOUR SPOTLIGHT SHINE ON LAKEWOOD FOREVER!

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*Mail to: Spotlight Society, Lakewood Center for the Arts, PO Box 274, Lake Oswego, OR 97034.*

*Questions? Call us 503-635-6338.*

## YES! I WANT TO JOIN THE SPOTLIGHT SOCIETY!

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State, Zip \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

I want more information, please contact me.

I have named Lakewood as a beneficiary in/of my:

Will (or by codicil to my will)     Trust

IRA     401(k)     SEP     Annuity

Life Insurance Policy     Property     Other

Please select one:

Designate my gift to the Lakewood Endowment Fund

Designate my gift to general operations and programs

Allow the Board to direct my gift where most needed