

LEGACY NEWS

SPRING 2017

Retirement Plans Can Support Unsurpassed Musical Experiences

LEE AND FLOY BARTHEL

DSO Director Emeritus, Gabrilowitsch Society Members, Governing Members, Volunteer Council Members, and 1887 Society Members

Floy and Lee Barthels' deep love of music has been the foundation of their relationship for more than 50 years.

In ninth grade, Lee witnessed a Detroit Symphony Orchestra concert at the Masonic Temple. It was his first major musical experience, and to him it was life-changing. He was so moved by the music that he began skipping school, and sneaking inside the venue without a ticket just to hear the DSO play more music. Lee was eventually caught skipping class and forced by his principal to discontinue his behavior.

Floy was swept off her feet by the operas she attended in Minneapolis with friends. She was close friends with an opera singer who introduced her to this form of classical music. Floy enjoyed the stories, music, and singing, and looked forward to attending the opera regularly.

Lee and Floy first met in 1959 on a blind date at the Minnesota Orchestra where Claudio Abbado was conducting that evening's concert. Set up by their circle of friends, they hit it off right away and wed soon after in March of 1960.

They began subscribing to DSO concerts, enjoying the shared experience of the music that brought them together. Their first DSO subscription was at Ford Auditorium in the upper balcony. During those days, they were launching their business and attending a concert was an enjoyable escape from their daily lives.

When Paul Ganson's effort to restore Orchestra Hall began, they were compelled to make their first



philanthropic contribution to enable the DSO to return to its home. Inspired by their abiding love of music, Lee and Floy have been incredibly generous to the DSO, supporting the operations and building projects with annual gifts.

Lee and Floy ultimately decided to name the DSO as a percentage beneficiary of their Individual Retirement Account (IRA). They knew the tax advantages of this gift vehicle would benefit both the DSO and their estate plans. They find it easy to make the gift, simply updating the beneficiary designation form with their broker. Their commitment and generosity will enable the DSO to offer unsurpassed musical experiences for generations to come.

The DSO is honored to be a huge part of the Barthels' lives and greatly benefits from their commitment to the future of our organization.

To learn more about IRA commitments, contact Dan Coleman at 313.576.5451 or dcoleman@dso.org

TIGERS, YOGA, MOVIES, AND A MOZART FESTIVAL

YOUR COMMUNITY-SUPPORTED ORCHESTRA IN ACTION

The DSO aimed for the sky with its fourth annual winter music festival. On display was the incredible music of genius Wolfgang Amadeus Mozart. His legendary status and uncompromising perfection in music composition juxtaposed with an unrelenting schedule of nearly back-to-back concerts during the 3-week festival set the stage for Maestro Leonard Slatkin and the DSO musicians.

Given the length of the festival it wasn't possible to perform the breadth of Mozart's repertoire. Slatkin focused the festival around three central themes: selections of Mozart not often performed, solos by DSO musicians, and interesting pairings of his works.

Each concert's main work was selected from his final six symphonies, which included the "Prague," "Hafner," and "Jupiter" symphonies. In addition, the DSO featured all four of the composer's horn concertos, the Flute and Harp Concerto, and all of his works for solo winds and strings. Quite a feat and treat for the audience. Works

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HIGH TEA

FRIDAY, OCTOBER 20, 2017

approximately 12:30 p.m., following the "Harold in Italy" coffee concert

such as *Eine Kleine Nachtmusik*, the Sinfonia Concertante, the lesser-played Concertone, and a variety of overtures rounded out the programs.

Rather than hiring out the more than thirteen solos, Slatkin looked to the DSO musicians. Principal and section players stepped into the spotlight and showcased the incredible talent of the musicians in our Detroit Symphony. These included Concertmaster Yoonshin Song, violinists Kimberly Kaloyanides Kennedy and Hai-Xin Wu, violist Eric Nowlin, hornists Karl Pituch, Dave Everson, Johanna Yarbrough, Scott Strong, oboist Alexander Kinmonth, flutists David Buck and Sharon Sparrow, clarinetist Ralph Skiano, and bassoonist Robert Williams.

“What do we learn from this experience? I would say that the sheer variety of Mozart’s compositional genius is on display,” said Maestro Slatkin. “All of these works are popular and all are masterpieces.”

The DSO collaborated with Mozart expert Kathryn Libin as the Festival’s resident Mozart Scholar. Libin gave pre-concert lectures and other talks that spoke not only to Mozart’s music, but also the historical context in which he

lived and wrote and his often turbulent personal life. Patrons reveled in the experience of a deeper dive into the composer’s life.

The Festival attracted DSO regulars and first-time classical concertgoers alike, and there were plenty of ways to get in on the fun. What’s more... players, coaches, and staff from the Detroit Tigers joined in on the Mozart Festival’s “opening day,” as the team made a stop at The Max on their annual Winter Caravan. First baseman Miguel Cabrera took a turn conducting the orchestra, and pitcher Daniel Norris plunked a few keys to celebrate the all-day Piano Sonata Marathon, which featured local musicians performing all 19 of Mozart’s piano sonatas over the course of approximately nine hours. And the festival wouldn’t have been complete without the chamber recital at the Steinway Piano Gallery, two post-concert opera showcases, screenings of



the documentary film *In Search of Mozart*, yoga set to Mozart music at Om @ The Max, and Wolfie — everyone’s favorite pint-sized mascot. Foodies were thrilled to take a seat at Salzburger’s, the temporarily made-over Paradise Lounge, with a variety of Mozart-themed food and drink specials

inspired by the composer’s native Austria.

The Detroit Symphony Youth Orchestra closed out this incredible 3-week festival with a majestic performance of Mozart’s *Requiem*, joined by members of the University Choir from the University of Michigan School of Music.

The DSO 2017 Mozart Festival set the bar high for future festivals. But Leonard Slatkin and the DSO are already looking forward to the fifth annual winter music festival, which kicks off in February 2018. Instead of focusing on one composer, the focus will be on the music of France. Buy your tickets and mark your calendars now. You won’t want to miss the French Festival and all the fun!

Helpful things to consider when selecting an estate advisor:

When it’s time to make or revise your estate plans, you may need to work with one or more estate planning professionals, such as an attorney or certified public accountant. How do you pick the right advisor for you and your needs? Great question! There is no one-size-fits-all answer, but here are some helpful things to consider in your search for an advisor:

- Does the advisor have experience and certifications in your state of residence? Estate laws differ from state to state (and country to country if you are a dual citizen).
- How do they charge for services, and how much? It is always helpful to get an idea of costs involved to ensure that they fit your specific budget and needs.
- Find out if they specialize in certain clients. This may make your relationship even more effective for planning purposes if you fit within their specializations.
- Check to see exactly what services the advisor provides. Depending on what they offer, it is possible their office has a one-stop solution for your needs or will just fulfill one specific need you have.
- Consider asking potential advisors what makes them and their services unique, and how they think they are the right fit for you and your needs.
- Engage in a conversation about how they prefer to communicate and how often. This will help you to understand if they align with your preferred methods of interactions and communications.
- Ask if there will be additional team members you will be working with, or if you will be directly working with the advisor you are meeting with. This can be helpful if you prefer highly personalized service.
- How much contact will there be? It is helpful to know if this matches your level of need and their level of need so that your working relationship will be strong.
- After meeting with the advisor, think about how the interaction went. Was it effective and beneficial for you? How did the personal advisor interact with you? Were the questions and conversations of value to you? Questions like these can help you evaluate the experience and determine who is the right Professional advisor for you.

Gift Annuities: A Gift that Pays You Too

BY DAN COLEMAN

Wise subscribers and donors alike are considering their estate plans throughout life, whether it is the draft of the first iteration or a revision of an existing estate plan. And many of them are considering how they can help the great music they love flourish for the next generation, as well as how they can take care of their loved ones. One of the critical components we are often looking at in future estate planning is ensuring that we have the resources we need to continue our lifestyle for years to come, such as covering health care expenses and those wonderful annual trips to new and exciting locations.

Did you know that you could make a one-time gift, and receive a guaranteed income for life? Would you like to earn interest on an investment that is better than the typical Certificate of Deposit or Savings Account rates currently available? Have you thought about supporting the future of the DSO with a gift that will be there in perpetuity?

Good news! There is a way to accomplish all three of these goals in one, easy to understand gift, the Charitable Gift Annuity.

A Charitable Gift Annuity (CGA) is a great way to create a guaranteed income stream for retirement, get a solid return in interest rates, and make a long-term investment to support the DSO. And what's even more exciting, anyone can do it!

How does it work?

The DSO offers CGAs through a partnership with the Community Foundation for Southeast Michigan. It is a simple agreement between the Community Foundation and you. In exchange for your gift to go toward the DSO's endowment fund held at the Community Foundation, you will receive a fixed, reliable income for the rest of your

life. You can fund it with cash, stocks, bonds, mutual funds, or a certificate of deposit. CGAs start at a minimum gift of \$10,000.

The Community Foundation will hold the principal and pay out a guaranteed interest rate, locked in for life. When the gift matures, the DSO will receive the remaining principal of the contribution in its permanent endowment fund held at CFSEM.

How are interest rates determined?

The American Council on Gift Annuities establishes the schedule of annuity rates. The rate is assigned based on the donors age, and currently range from 4.4% to 9.0%. Rates are periodically re-evaluated with the help of professional actuaries.

What benefits exist for this kind of contribution?

A CGA is a planned gift, and you will be celebrated as a member of the 1887 Society. This is a group of dedicated supporters that have made thoughtful contributions and commitments to the DSO's future. Benefits include an annual high tea, access to special events, and more.

What tax benefits might I enjoy?

- A portion of the original gift may be tax-deductible
- A portion of the payments may be tax-free
- Reduced estate tax liability

To learn more about a CGA and how this might work for your situation, please contact Dan Coleman at 313-576-5451 or dcoleman@dso.org.



STEPHANIE AND
FRED SECREST
(1922/23 – 2016)

Stephanie and Fred Secrest were lifelong supporters of the Detroit Symphony Orchestra, a mainstay in their lives for over 65 years. They believed deeply in the power of music to foster civic pride and community spirit to bring joy and meaning to daily life. Fred and Stephanie took great pride in sharing this passion with their children, grandchildren, and great grandchildren.

In 1948, they moved to Detroit where Fred enjoyed a story-book career at the Ford Motor Company and Stephanie served as a philanthropic leader in the schools as well as various art and civic organizations. Fred and Stephanie were known for their open-minds and their diverse connections with people from different backgrounds and cultures. They were together for over 72 amazing years, deepening their connection through family, friends near and far, art, and music.

Coupled with their generous estate commitment and their Charitable Gift Annuities in support of the DSO's endowment, Stephanie and Fred Secrests' love of music was expressed in their endowment of the Secrest Professorship of Performing Arts at Alma College, on whose board Fred served for many years. The DSO is most grateful to have received this unwavering and inspirational commitment to the future of unsurpassed musical experiences in Detroit.

With a planned gift to the DSO, you can support the future of world-class music in Detroit.

This information is presented solely for educational purposes. Please consult your own legal or financial advisor to determine the best gift option for you.

Tens of Thousands of Students View DSO Educational Concert Webcasts

YOUR COMMUNITY-SUPPORTED ORCHESTRA IN ACTION

Since its inception in 1887, the DSO has actively supported the music education of local students through the Educational Concert Series (ECS). In November 2014, the orchestra furthered this work by bringing these concerts into classrooms around the globe at no cost to schools. Being able to attend concerts live in Orchestra Hall is no longer an issue.

Live from Orchestra Hall: Classroom Edition is the DSO's webcast series of the ECS performances. Three seasons later, the Classroom Edition series

has reached hundreds of thousands of students in Detroit and around the globe. Collectively, three hundred local and regional schools (including all Detroit Public Schools) tune in, and in addition more than 100 schools across the country and the world.

Teachers and educators who sign up for the DSO webcasts are provided with curriculum guides, discussion topics, and other resources to guide musical conversations before and after the concert experience. "This is ingenious," said Jonathan Walker, dean of K-4 grade students at University Yes Academy in

Detroit. "It broadens their horizons, and it exposes them to something that they're typically not exposed to. I hope it sparks something—maybe one day they'll want to join an orchestra."

This is made possible through the generosity of Mandell L. and Madeleine H. Berman and the Mandell and Madeleine Berman Foundation for their support of the Classroom Edition webcast series. The Bermans will be honored at the 2017 Heroes Gala, the DSO's annual celebration of the remarkable men and women who

impact the vision, values, and success of the organization. Proceeds from the event support the DSO's commitment to transforming the lives of children and youth across our region through music education, including the Classroom Edition webcasts.

"Education is central to the mission of the DSO, and we continuously strive to increase our impact," said DSO President and CEO Anne Parsons. "Through music, we can help students develop critical and analytical skills, facilitate teamwork, and encourage social success."



DETROIT SYMPHONY ORCHESTRA
Planned Giving Council

The DSO's Planned Giving Council recognizes the region's leading financial and estate professionals whose current and future clients may involve them in their decision to make a planned gift to the Detroit Symphony Orchestra. Members play a critical role in shaping the future of the DSO through ongoing feedback, working with their clients, supporting philanthropy, and attending annual briefings.

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