



FOR YOUTH DEVELOPMENT
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

Heritage Club - Information Form YMCA OF CATAWBA VALLEY

The YMCA Endowment Fund provides a secure, stable foundation upon which the YMCA can build its future. For over 50 years, the Y has served as a community hub where people can gather to make new friends, share interests, discuss pressing issues and create lasting change. Gifts to the Endowment Fund are invested, allowing the YMCA to use the interest to support critical programs that require contributions to survive. We invite you to become part of the Heritage Club by filling out this **confidential** and **optional** form to help our YMCA better prepare for the future.

Full Name: _____

Full Address: _____

Phone: _____ Email: _____

Spouse's name: _____

Children's names: _____

Grandchildren's names: _____

Purpose for which gifts to the endowment fund are to be used:

- A. General purposes of the YMCA of Catawba Valley throughout the service area.
 B. Specific purposes of the YMCA of Catawba Valley as follows:
For _____ branch **OR** for _____ program.

Contact information:

Name of attorney: _____

Name of financial planner: _____

Name of CPA: _____

Method(s) used to qualify for membership in the Heritage Club:

- A. Will or revocable trust: _____% to the YMCA **OR** \$_____ to the YMCA
 Primary beneficiary Contingent beneficiary
 B. Outright gift of: Cash Stock Property
 C. Life insurance: \$_____
 Primary beneficiary Contingent beneficiary
 D. Short-term trust
 E. Charitable gift annuity
 F. Charitable remainder unitrust or annuity trust
 G. Pension plan remainder (e.g., IRA, 401(k))
 H. Real estate: Home Farm

Signature: _____ Date: _____