

The Heritage Club

The Heritage Club is an organization of people who have shown their long-term interest and support of the YMCA of the Mid-Peninsula and its branches by either a direct contribution to the Endowment Fund, or by including the YMCA in their estate plans. IT IS THE COMMITMENT RATHER THAN THE AMOUNT that is the basic factor in qualifying as a Heritage Club member.

Each year these special friends of the YMCA are invited to a dinner and program to receive recognition, learn how Endowment Funds are being used, and to enjoy a relaxed, informal social occasion.

Heritage Club Membership

An individual or couple is qualified for Heritage Club membership by any of the following:

1. An outright gift to the YMCA Endowment Fund of cash, securities, property or other marketable assets.
2. Creation of a unitrust, annuity trust, gift annuity, pooled-income fund, short-term trust or other life estate program.
3. Naming the YMCA of the Mid-Peninsula or one of its branches as the eventual recipient of a life insurance policy, qualified retirement plan, 401(k), 403(b), or IRA.
4. Naming the YMCA of the Mid-Peninsula or one of its branches to receive a bequest in one's will.
5. Expressing an intent to do any one of the foregoing at such time as circumstances permit.

An individual may direct his or her gift to the Association-at-large, a specific branch, or a named Endowment Fund. The Association's legal name is "YMCA of the Mid-Peninsula." If a branch is designated, it should be mentioned in all documents after the Association's legal name.

Gifts may also be directed for a specific program or to one of the existing endowment funds.

The goal of the YMCA's Endowment program is to create an Endowment Fund of sufficient size to produce a portion of the Association's annual program funding requirements. In supporting this effort, YMCA friends like yourself will help to ensure a strong, viable YMCA for the youth of future generations.

For further information, please phone the Development Office at 650.842.3553, or complete and return the form on the reverse.

YMCA of the Mid-Peninsula

Association Office

2400 Geng Road, Suite 120
Palo Alto, CA 94303
650.493.9622
Fax 650.856.4703

East Palo Alto YMCA

901 Weeks St.
East Palo Alto, CA 94303
650.328.9622
Fax 650.323.5585

El Camino YMCA

2400 Grant Road
Mountain View, CA 94040
650.969.9622
Fax 650.969.1053

Page Mill YMCA

755 Page Mill Road, Building B
Palo Alto, CA 94304
650.858.0661
Fax 650.858.0664

Palo Alto Family YMCA

3412 Ross Road
Palo Alto, CA 94303
650.856.9622
Fax 650.856.7783

Sequoia YMCA

1445 Hudson Street
Redwood City, CA 94061
650.368.4168
Fax 650.368.1140

For Charitably Inclined Individuals . . .

Substantial tax savings and other important benefits are available through a variety of current and deferred gift endowment plans:

An Outright Gift (cash, securities)

- Creates current income-tax savings
- Provides possible capital-gains savings

A Charitable Remainder Trust

- Provides lifetime income to the donor or the designated beneficiary
- Creates income-tax savings in the year of the gift
- Allows capital gains, estate and gift-tax savings
- Provides for tax-free sale of assets

Naming the YMCA in a Life Insurance Policy/Retirement Plan

- Makes possible a large future gift
- Provides possible current income tax savings

A Bequest in One's Will

- Insures that assets one needs during life will not be dissipated, yet makes possible a substantial charitable gift in memory of an individual
- Creates estate-tax savings

Memorial/Honorary Gifts

- A loved one can be remembered forever through contributions to the Endowment Fund
- A special personal achievement may be recognized through a donation to the Endowment Fund

For further information, and/or to indicate your qualifications for YMCA Heritage Club membership, please complete and return the following form.

(All information is held in strict confidence)

- I would like to receive a comprehensive booklet illustrating methods of giving
- I would like to visit with a member of the YMCA board or staff concerning my interests
- For your records, I do or shall qualify as a member of the Heritage Club by the following method:
- Bequest in Will
 - Charitable Remainder Trust
 - Outright Endowment Fund Gift
 - Life Insurance
 - Retirement Plan (401k/403b/IRA)
 - Intent to do any one of the above

Name(s) _____

Address _____

City _____

State _____ Zip _____

Phone _____

E-Mail _____

For additional information, please contact:

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THE HERITAGE CLUB

OF THE

YMCA OF THE

MID-PENINSULA

ENSURING THE VIABILITY
OF THE YMCA
FOR GENERATIONS
TO COME



YMCA
We build strong kids,
strong families, strong communities.