

YMCA OF SILICON VALLEY
HERITAGE CLUB
GIFT INFORMATION FORM

Full Name: _____ Birth date: _____

Home address: _____

City: _____ State: _____ ZIP Code: _____

Email: _____ Phone: _____

Spouse's name: _____ Birth date: _____

Children's names and birth dates: _____

Grandchildren's names and birth dates: _____

Purpose for which gifts to the endowment fund are to be used when they become available in future years:

- A. General purposes of YMCA of Silicon Valley throughout the Silicon Valley region.
- B. Specific purposes of YMCA of Silicon Valley as follows:
For _____ branch. For _____ program.

Note: Details beyond type of gift are often obtained after the gift is made or after a trusted relationship with local Y staff is established.

Recognition Preference as a Heritage Club Member:

Please check one:

- I confirm that I have designated a gift for the Y's Endowment and I wish to be recognized as a Heritage Club member.
- I confirm that I have designated a gift for the Y's Endowment, but I wish to remain anonymous at this time.

Biographical Information:

Heritage Club Member as of: _____

Please check one:

- I have made an outright gift to support the Y's Endowment. If you check here, please skip to number 3 below.
- I have made a planned gift from my estate to support the Y's Endowment.

1. This gift has been designated to the Y in my:

- | | |
|---|--|
| <input type="checkbox"/> Last Will & Testament | <input type="checkbox"/> Life Insurance Policy |
| <input type="checkbox"/> Irrevocable Trust | <input type="checkbox"/> Revocable Living Trust |
| <input type="checkbox"/> Charitable Remainder Trust | <input type="checkbox"/> Charitable Gift Annuity |
| <input type="checkbox"/> Retirement Plan (<input type="checkbox"/> IRA <input type="checkbox"/> 401(k) <input type="checkbox"/> Pension) | |
| <input type="checkbox"/> Other: _____ | |

2. The estimated value of my planned gift to the Y is: \$_____

3. The purpose of my gift is to support (please check one):

- The YMCA General Endowment Fund for the Y's general uses and purposes.
- The General Endowment Fund of a Branch for its general uses and purposes:

Please check which general endowment fund you would like your gift to support:

- | | |
|--|---|
| <input type="checkbox"/> YMCA of Silicon Valley (Association Office) | <input type="checkbox"/> Camp Campbell YMCA |
| <input type="checkbox"/> Northwest YMCA | <input type="checkbox"/> Central YMCA |
| <input type="checkbox"/> East Valley Family YMCA | <input type="checkbox"/> Palo Alto Family YMCA |
| <input type="checkbox"/> El Camino YMCA | <input type="checkbox"/> Sequoia YMCA |
| <input type="checkbox"/> Lewis & Joan Platt East Palo Alto Family YMCA | <input type="checkbox"/> South Valley Family YMCA |
| <input type="checkbox"/> Mount Madonna YMCA | <input type="checkbox"/> Southwest YMCA |

- For a designated purpose as stated below (gift must be a minimum of \$25,000):

Printed Name

Signature

Date

Thank you for your generous support of the YMCA of Silicon Valley today and for years to come. Please email erin.otoole@ymcasv.org or call her at 408-351-6437 if any changes or amendments are made.

Please return to:

YMCA of Silicon Valley - Financial Development Department
550 S Winchester Blvd, Ste 250, San Jose, CA 95128