

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 notify the Financial Development Department if any changes or amendments are made.*

Please return to:
YMCA of Silicon Valley - Financial Development Department
80 Saratoga Avenue, Santa Clara, CA 95051