



FOR YOUTH DEVELOPMENT®  
FOR HEALTHY LIVING  
FOR SOCIAL RESPONSIBILITY

## YMCA OF THE EAST VALLEY ENDOWMENT FUND QUICK AND EASY

The YMCA of the East Valley wishes to invite our friends to consider becoming members of our Heritage Club.

The YMCA of the East Valley Heritage Club recognizes those who have included the YMCA of the East Valley in their estate plans in a variety of ways.

Here are a few simple but meaningful ways to participate:

### OUTRIGHT GIFTS

A gift of cash or other assets such as appreciated securities (any amount) will help build the endowment immediately.

### WILLS

A gift of a percentage of estate assets or a specific sum of money to the YMCA of the East Valley Endowment Fund in your will.

Sample language:

*"I give to the YMCA of the East Valley, Tax ID #95-1684787, located in Redlands, California, for its Endowment Fund, all (or stated percentage) of the rest, residue, and remainder of my estate..."*

### LIFE INSURANCE

Complete a "change of beneficiary form" for an existing policy; could also be a contingency beneficiary designation.

Sample language:

*"I give X percent to my heirs (list names) and X percent to the YMCA of the East Valley, Tax ID #95-1684787, located in Redlands, California, for its Endowment Fund"*

Transfer ownership of an existing policy or purchase a new policy and make the YMCA of the East Valley Endowment Fund the owner and irrevocable beneficiary.

### RETIREMENT FUNDS

Complete a "change of beneficiary form" for an IRA or other retirement fund.

Sample language:

*"X percent to my heirs (list names) and X percent to the YMCA of the East Valley, Tax ID #95-1684787, located in Redlands, California, for its Endowment Fund"*

You are encouraged to discuss these issues with your own attorney or financial advisor!