

GIVE THE FUTURE

BECOME A HERITAGE CLUB MEMBER AND GIVE THE YMCA TO FUTURE GENERATIONS

Membership in the Heritage Society simply requires a commitment of a gift (now or in the future) that will benefit the Endowment Fund to ensure that the Northern Middlesex YMCA stays strong for future generations. Donors can restrict their gift to benefit a particular program and/or capital project.

Northern Middlesex YMCA

You may select from a variety of gift vehicles: • An outright gift of cash, property, stock or securities to a current YMCA endowment fund • A Testamentary Gift through your will, revocable living trust, or benefits from your life insurance policy • Life Insurance policy transferred to the Northern Middlesex YMCA as beneficiary • A Charitable Remainder Unitrust allowing you to leave a gift in trust to the YMCA with income returning to you throughout your lifetime • Charitable Gift Annuities can provide a lifetime income for you in return for a gift to the Northern Middlesex YMCA • A Named Endowment Gift or Capital Project providing a lasting tribute to a loved one at a YMCA. **Before you decide on a planned gift, you should consult with a certified financial planner or tax advisor.**

Leave a lasting mark on the Northern Middlesex YMCA

DETACH HERE

I am interested in learning more about the Northern Middlesex YMCA Heritage Club.

- ☐ I have included the Northern Middlesex YMCA in my estate plan but have not yet notified you.
- ☐ I am interested in learning more about the YMCA Heritage Club, and charitable estate planning.
- ☐ I am interested in a Heritage Club Membership and wish to include the YMCA in my estate planning in the following method:

- | | |
|--|--|
| <input type="checkbox"/> Bequest in will/living trust | <input type="checkbox"/> Charitable Remainder Unitrust |
| <input type="checkbox"/> Outright gift of cash, securities or properties | <input type="checkbox"/> Retirement Plan Beneficiary |
| <input type="checkbox"/> Life Insurance | <input type="checkbox"/> IRA/Roth Beneficiary |
| <input type="checkbox"/> Charitable Gift Annuity | |

Please add my e-mail and contact information to the YMCA's Heritage Club Publication mailing list.

Name: _____

Address: _____

City/State/Zip: _____

Telephone No: _____ Email: _____

Please return this form to:

Lori Lodge, Director of Fund Development
99 Union Street
Middletown, CT 06457

Contact for additional information:

Lori Lodge: (860) 343-6232 or llodge@midymca.org



* Unrestricted gifts will be allocated to the general endowment fund. The Northern Middlesex YMCA and the Board of Directors determine annual distributions. Heritage Club Members are invited to an annual meeting, Heritage Society event, and receive special release YMCA publications.

MidYMCA.org