



YMCA of the Fox Cities Heritage Club Enrollment Form

I/We have provided a gift for the YMCA of the Fox Cities as set forth in my/our will, revocable trust, retirement plan, or other estate plan or give an outright gift to the YMCA Endowment Fund.

Please Select Endowment Fund Designation:

- YMCA of the Fox Cities
- Apple Creek YMCA
- Appleton YMCA – Capital Endowment
- Appleton YMCA – Program Endowment
- Camp Nan A Bo Sho
- Fox West YMCA
- Heart of the Valley YMCA
- Neenah-Menasha YMCA

Optional: My Gift should be recognized at the following level:

- Platinum \$1,000,000
- Gold \$100,000 +
- Silver \$50,000+
- Bronze \$25,000+
- Patron \$10,000+
- Benefactor \$1,000+

I wish to remain anonymous.

Life insurance

Primary Beneficiary Contingent Beneficiary YMCA as Owner

Bequest For your records, I/We have enclosed the relevant portion of my/our estate plan that pertains to my/our gift. (Optional) _____% to the YMCA or specific \$_____

Please print Executor's contact information

IRA remainder or other retirement plan gift Name of Plan _____

Estate Trust

Outright Gift of: Cash Property Stock IRA Distribution

I would like to establish a named fund or a memorial within the YMCA Endowment Fund. (Carol Peterson will contact you to make arrangements.)

Name: _____ Spouse: _____
(Please print full name)

Recognition name(s): _____
(Please print)

Address: _____

City: State: Zip: _____

Home Phone: _____ Work Phone: _____

E-mail Address: _____

Signature: _____ Date: _____

Signature: _____ Date: _____

Please return this form to: Carol Peterson, Financial Development Director
YMCA of the Fox Cities, 218 E. Lawrence Street, Appleton, WI 54911
920-954-7637 cpeterson@ymcafoxcities.org



YMCA of the Fox Cities Heritage Club

YMCA Heritage Club – Ensuring the Future

Imagine a gift that outlives you, allowing future generations to experience and enjoy the world of camping, arts, healthy living and all the other character development programs included in the YMCA mission work. That's the goal of the Heritage Club.

The Heritage Club represents a group of friends of the YMCA who make an outright gift to the YMCA Endowment Fund or have made plans to include the organization in their estate plans – whether by will, trust, insurance or life income arrangement. Membership in the Heritage Club is open to all.

In thanks for their generous support, Heritage Club members are given special benefits and recognition for their heartfelt commitment to the YMCA. Membership benefits to the Heritage Club include:

- Invitation to the annual Heritage Club Dinner.
- Your name(s) listed in the YMCA of the Fox Cities Annual Report.
- Invitation to special events.

The growth of YMCA permanent Endowment Fund ensures the growth and future vitality of one of the region's greatest human service organizations. You are invited to create your own legacy ~ make a difference in the lives of children and families in the communities we live in ~ through the YMCA of the Fox Cities.

To join the YMCA Heritage Club, call the Executive Director at your branch to request an enrollment form, return the form with as much information as you feel comfortable sharing, or contact Carol Peterson, Financial Development Director at 920-954-7637 to discuss gift options that may benefit you, your heirs and the YMCA of the Fox Cities.

