



# YMCA BUFFALO NIAGARA ENDOWMENT GIFT DESIGNATION FORM



Full Name: \_\_\_\_\_ Birth Date: \_\_\_\_\_

Spouse's Name: \_\_\_\_\_ Birth Date: \_\_\_\_\_

Home Address: \_\_\_\_\_ Telephone: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

E-Mail: \_\_\_\_\_

Purpose for which endowment gift is to be used:

A. The general purpose of YMCA Buffalo Niagara.

B. The \_\_\_\_\_ Branch of YMCA Buffalo Niagara for the specific purpose\* of supporting \_\_\_\_\_

\*If said designations are no longer possible due to the elimination of program or services, designated funds will revert to the General Endowment Fund.

## HERITAGE SOCIETY ELIGIBILITY

Individuals who designate the YMCA Buffalo Niagara as a beneficiary of their estate plan or provide an outright gift of \$5000 or more to the YMCA's Endowment Fund will qualify for membership in the YMCA's Heritage Society. Please identify method(s) used to qualify for membership in the Heritage Society below, if applicable.

\_\_\_\_\_ A. Will/ Revocable Trust \_\_\_\_\_% to the YMCA \$\_\_\_\_\_ to the YMCA

Primary Beneficiary     Contingent Beneficiary

\_\_\_\_\_ B. Outright Gift of:     Cash     Stock     Property    (\$5000 minimum)

\_\_\_\_\_ C. Life Insurance: \$\_\_\_\_\_     Primary Beneficiary     Contingent Beneficiary

\_\_\_\_\_ D. Charitable Gift Annuity

\_\_\_\_\_ E. Charitable Remainder Trust

\_\_\_\_\_ F. Charitable Lead Trust

\_\_\_\_\_ G. Retirement/Pension Plan     Remainder     Roll Over

\_\_\_\_\_ H. Life Estate     Home     Farm

Preferred recognition \_\_\_\_\_  
(i.e. John and Jane Doe, Mr. and Mrs. John Doe)

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**\*\*\*All information is confidential\*\*\***