



FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

YMCA of the Capital Area Letter of Intent – Planned Gift

Thank you for sharing the news of your planned gift to the YMCA of the Capital Area. Your gift will ensure that the Y’s impactful work will continue for many years into the future.

Please take a moment to fill out this form regarding your gift.

Printed name _____ Birthdate _____
 Address _____
 City _____ State _____ Zip _____
 Home Phone _____ Cell Phone _____
 Email _____

Printed name _____ Birthdate _____
 Address _____
 City _____ State _____ Zip _____
 Home Phone _____ Cell Phone _____
 Email _____

Family Member Contact _____ Relationship _____
 Phone _____ Email _____

Estate attorney/Professional Advisor _____ Phone _____
 Email _____ Firm Name _____

Please designate my/our gift to the following:

YMCA of the Capital Area

Endowment Fund Unrestricted

Branch: _____

Endowment Fund Unrestricted

I wish to establish a new, named fund with my deferred gift. Eligible for gifts valued at \$25,000 or more.

Additional Information

Turn Over

YMCA of the Capital Area Letter of Intent – Planned Gift

The gift is in my/our:

- | | |
|--------------------------------------|--|
| <input type="checkbox"/> Will | <input type="checkbox"/> Life insurance policy |
| <input type="checkbox"/> Trust | <input type="checkbox"/> Retirement account |
| <input type="checkbox"/> Other _____ | |

Projected gift value:

This information is used for future endowment planning purposes only. The YMCA understands that the projected value of some planned gifts will change over time.

- The approximate value of the gift today is \$ _____
- I prefer not to disclose an amount at this time.

May we list you as a member of the YMCA Cornerstone Endowment Society?

- Yes, please feel free to publish my name in recognition of my gift and as motivation for others to leave planned gifts to the YMCA.

I/we wish my/our names to appear as: _____

- No, please keep me anonymous and do not list me as a member of the Cornerstone Society in the annual report and other materials.

Change of Circumstances

Should the purpose for which this gift is established cease to exist or become difficult to fulfill, the YMCA of the Capital Area may modify the purposes, or re-direct use, as deemed appropriate and generally consistent with the Donor's original charitable intentions. The name of the honoree(s) shall remain associated with this gift.

Signature _____ Date _____

Signature _____ Date _____

Designate your gift to:

YMCA of the Capital Area

350 S. Foster Dr.
Baton Rouge, LA 70806
Federal Tax Identification # 72-0408994

On your estate paperwork, please indicate the camp or community hub your planned gift will be directed toward.

The YMCA of the Capital Area is a tax-exempt, nonprofit organization under section 501(c)(3) of the Internal Revenue Code.

Return this form to:

Stacey Emick Howell
YMCA of the Capital Area
Planned Giving
350 S. Foster Dr.
Baton Rouge, LA 70806

(E) showell@ymcabr.org
(P) 225 923 0653 x1102

Please include, or forward when available, copies of relevant portions of your estate planning documents and/or beneficiary designations.

Thank you for supporting strong communities across the generations through your visionary investment in the YMCA.

Turn Over