



CREATING A LEGACY AT THE YMCA OF GREATER DAYTON

The YMCA of Greater Dayton wishes to invite our friends to consider becoming members of the Heritage Club. The Heritage Club recognizes those who have included the Y in their long range plans in a variety of ways.

Here are a few simple but meaningful ways to participate:

OUTRIGHT GIFTS

A substantial gift of cash or other assets such as appreciated securities to help build the Endowment Fund immediately.

WILLS

A gift of a percentage of estate assets or a specific sum of money in your will.

SAMPLE TESTAMENTARY LANGUAGE IS PROVIDED ON THE BACK OF THIS PAGE

LIFE INSURANCE

Complete a "change of beneficiary form" for an existing policy.

SAMPLE LANGUAGE:

"X percent to my heirs (list names) and X percent to the YMCA of Greater Dayton, tax ID #31-0537517."

Transfer ownership of an existing policy or purchase a new policy and make the Y 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 YMCA of Greater Dayton, tax ID #31-0537517"

We encourage you to discuss these issues with your own attorney or financial advisor. Please call Dale Bruner at (937) 223-5201 or email at dbruner@daytonymca.org for additional information.



FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

BEQUEST LANGUAGE

FOR A SPECIFIC BEQUEST:

I give and bequeath [a %, dollar amount or specific asset] to the YMCA of Greater Dayton, located in Dayton, Ohio tax #31-0537517 for the benefit of _____(optional)

FOR RESIDUARY BEQUEST:

I direct that the remainder of my estate, whether real property, personal or mixed and wheresoever situated, be distributed to the YMCA of Greater Dayton, tax #31-0537517. My Executor shall, at the request of the YMCA of Greater Dayton liquidate and sell any real estate or tangible personal property which is part of the residue of my estate before making distribution.

OTHER HELPFUL LANGUAGE FOR ANY WILL:

I instruct that all charitable gifts, bequests and devises should be made, to the extent possible, from assets that constitute income in respect of a decedent, as that term is defined in the Internal Revenue Code.

NON-TESTAMENTARY LANGUAGE FOR DESIGNATION OF BENEFICIARY

Donors may wish to designate a charity or fund as the beneficiary of assets such as life insurance, stock accounts and IRAs. This allows the donor to have complete control of his or her assets during the donor's lifetime. At the donor's death, the asset passes without probate to the beneficiary designated.

In order to designate a beneficiary, the donor should contact the custodian of the asset and request a beneficiary designation form. The fund may be designated as either primary or as contingent beneficiary. Suggested language is as follows:

_____ % to the YMCA of Greater Dayton, located in Dayton, Ohio tax #31-0537517 for the benefit of _____(optional)