



FOR YOUTH DEVELOPMENT®  
FOR HEALTHY LIVING  
FOR SOCIAL RESPONSIBILITY

## YMCA of Greater Long Beach Heritage Club Intention Form

I (We) wish to embrace the mission and vision of the YMCA of Greater Long Beach by notifying you of a planned gift to benefit the YMCA of Greater Long Beach. I wish to be recognized as a member of the *YMCA's Heritage Club*.

Name(s): \_\_\_\_\_

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

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

Telephone Number(s): \_\_\_\_\_

Email Address(es): \_\_\_\_\_

### Gift Designation:

- My gift is unrestricted (to be used where the need is greatest)
- Direct my/our gift to the YMCA of Greater Long Beach Endowment Fund
- Provide instructions for distribution on the back of this form with your signature
- I would like to designate my gift to the following branch:
  - Camp Oakes
  - Community Development
  - Early Childhood Education
  - Fairfield Family YMCA
  - Los Altos YMCA
  - Los Cerritos YMCA
  - Lakewood Family YMCA
  - YMCA of Greater Long Beach

*Please consider including in your document a clause that allows a failed or lapsed gift, for example a gift given to a predeceased beneficiary, be given to the YMCA of Greater Long Beach.*

### Statement of Intended Purpose of the Gift

(please attach a statement if necessary)

---

---

---

**My gift arrangement \_\_\_\_\_ has been \_\_\_\_\_ will be made as follows:**

- |   |   |
|---|---|
| <input type="checkbox"/> Bequest                    | <input type="checkbox"/> Retirement Assets Designation          |
| <input type="checkbox"/> Charitable Remainder Trust | <input type="checkbox"/> Gift of Life Insurance                 |
| <input type="checkbox"/> Charitable Lead Trust      | <input type="checkbox"/> Retained Life Estate                   |
| <input type="checkbox"/> Charitable Gift Annuity    | <input type="checkbox"/> "description of property" (contact us) |

*Should the purpose of this gift become obsolete, it is the responsibility of the YMCA of Greater Long Beach Board of Directors to discuss the future use with the donor. In the event the donor is deceased, the Board of Directors will designate the gift for a similar purpose with the most need.*

**Recognition:**

- You may recognize me (us) as a member of the Heritage Club in publications

List our names as follows: \_\_\_\_\_

- We prefer to remain private

\_\_\_\_\_  
PRINT NAME

\_\_\_\_\_  
PRINT NAME

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

ACCEPTED BY: \_\_\_\_\_  
YMCA of Greater Long Beach

**PRIVACY STATEMENT**

*YMCA of Greater Long Beach is committed to protecting your privacy. We collect donor information so that we can offer personalized stewardship of your gift. We treat this information as private and confidential, and we will never disclose your data to third parties unless required by law or upon your request. We will not distribute your donor information to be used in mailing lists, surveys, or any other purpose other than what is required to perform our services.*