

I/We accept, with pleasure, the invitation to become a member of the Greensburg YMCA Heritage Foundation (Gifts of \$1,000 or more).

I/We would like to support the Greensburg YMCA Heritage Foundation (Gifts up to \$999).

Enclosed is a cash gift of:
\$ _____

I/We have included the Heritage Foundation in my/our estate planning through (Check as many as applicable):

- Will/Bequest
- Trust
- Life Insurance
- Appreciated Securities/Real Estate
- I/We would like more information

Name

Spouse's Name

Address

City/State/Zip

Phone

Email

Signature

Signature



**FOR YOUTH DEVELOPMENT
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY**

GREENSBURG YMCA

101 South Maple Avenue Greensburg, PA 15601

(P) 724-834-0150

www.greensburgymca.org



Building upon a Strong Foundation for Future Generations



GREENSBURG YMCA HERITAGE FOUNDATION

Supporting the Greensburg YMCA
Heritage Foundation is an opportunity
for the community to ensure
the Greensburg YMCA will continue
to positively impact future generations



**FOR YOUTH DEVELOPMENT
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THANK YOU FOR YOUR INTEREST IN THE GREENSBURG YMCA HERITAGE FOUNDATION.

You are cordially invited to become a member of the Greensburg YMCA Heritage Foundation. Our Foundation members are a special group of men and women who believe in the tradition and mission of the YMCA. Their goal is to ensure that the Greensburg YMCA continues for future generations.

INVESTMENT POLICY SUMMARY

All gifts received by the Heritage Foundation are invested with the utmost care and responsibility by the selected Board of Trustees. Unless otherwise stipulated by the donor, the earnings from the invested funds will be reinvested to ensure the Endowment Fund balance will continue to grow. The Board of Trustees currently has a Fund balance goal of \$1,000,000, prior to the distribution of income. A complete Investment Policy Statement is available upon request.

SPENDING POLICY SUMMARY

The primary purpose of the Greensburg YMCA Heritage Foundation is to generate income to be paid to the Greensburg YMCA to use as a part of their general operating budget. This includes the preservation of facilities, as well as other specific purposes the Board of Trustees deems appropriate. Until the Endowment Fund balance reaches its goal of \$1,000,000, the Board of Trustees will reinvest all income earned by the Endowment Fund on an annual basis to further its growth.



HOW YOU CAN MAKE A PLANNED CHARITABLE GIFT:

WILLS & BEQUESTS

A gift to the Foundation by will permits you to retain all of your assets during your lifetime and/or the life of your spouse. Designations may be for a percentage of your estate or for a specified amount.

CHARITABLE TRUST

A charitable trust can provide income to you and your spouse as long as you both shall live. Thereafter, the trust principal will go to the Foundation. You may also name additional charities as principal recipients.

LIFE INSURANCE

When the added protection of an insurance policy is no longer needed, transferring the policy's ownership to the Foundation can result in tax benefits for you and a generous gift for the YMCA. The Foundation can also be included as a beneficiary of a policy.

CHARITABLE LEAD TRUST

This provides current income for the Foundation for a specific period of time you determine: 5, 10, 15 years or more. At the end of the term, the assets are distributed to the loved ones you have designated.

OUTRIGHT GIFT

A direct gift of cash, appreciated securities or real estate may be the most convenient way for you to make a contribution to the Foundation.

When selecting any of these methods to support the Heritage Foundation, you may wish to consult your own tax counsel to determine how rules regarding charitable giving apply to you specifically. If you would like more information about charitable giving and the Greensburg YMCA Heritage Foundation, please contact:

George O'Brien, Chief Executive Officer at g.obrien@gbgymca.org or 724-834-0150 ext 112