

**YMCA  
Heritage  
Club**

**Henderson  
County Family  
YMCA  
Endowment Program**

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## **OUR HERITAGE**

**The Henderson County Family YMCA was founded in 1894 and has been responsive to changing needs and providing life-changing programs and services to Henderson County residents, both male and female, of all ages ! This YMCA is dedicated to building strong kids, strong families, and strong communities.**

## **COMMITMENT TO THE FUTURE**

**The Henderson County Family YMCA has been meeting needs of countless numbers of people throughout Henderson County for 116 years! Generation after generation of men, women, and children, of all ages, have played, worked out, socialized and learned together at the YMCA. Many members that are current volunteer leaders here at the Y, grew up with the YMCA, and want to see those same opportunities exist for future youth, so they can become our next leaders !**

**By becoming a member of the Y Heritage Club, you will be making a commitment that will help ensure the future delivery of existing and new programs, provide scholarships for youth and families, and services for the needy and for our community.**

**With each passing year, as more friends of the Y decide to include the YMCA in their annual giving, and in their estate or will plans, the YMCA will build long-range financial stability, enabling the YMCA to continue to meet the needs of Henderson County residents.**

**Income from the Endowment fund, overseen by an Endowment Committee, but managed and invested by professional investors, will be used each year to benefit thousands of our county youth, teens, adults, senior citizens and families !**

## **YMCA MISSION**

**“To put Christian principles into practice through programs that build healthy spirit, mind and body for all”.**

**“That no person(s) shall be denied access to programs, services or membership, due to an inability to pay”**

**This past year, our YMCA awarded over \$336,478 in scholarships to over 2,826 people, that helped underwrite the fees for YMCA programs and membership !**

## **THE HERITAGE CLUB**

**The Heritage Club is a special group of people who believe in the mission of the Henderson County Family YMCA and want to ensure that valuable life-changing programs and services will be continued for future generations!**

## **HERITAGE MEMBERSHIP**

**Becoming a member of the Heritage Club requires a commitment which now and/or in the future, will add to the Y's Endowment Fund.**

**There are a variety of gift options available to qualify for the Heritage Club. We hope you will consider making an annual gift, as well as one of the long term financial commitments below.**

**Outright Gifts**    **Cash, stocks, land, homes, jewelry, cars, boats, etc...**

**Life Insurance**        **By naming the YMCA as owner, primary or the contingent beneficiary of a new or existing policy.**

**Will Bequest** Designating the YMCA for a percentage of the donor's estate or a specific amount.

**Charitable Trust** Gifts with life income retained by the donor; charitable remainder unitrust.

## **DESIGNATION OF BEQUEST & GIFTS**

Bequests and gifts may be made to the Henderson County Family YMCA, for any stated purposes so designated by the donor, or for the general purpose of the YMCA, with or without restrictions.

The wishes indicated by donors will be meticulously observed by the Endowment Development Committee of the Henderson County Family YMCA, its Board and staff. It will be the practice of the Henderson County Family YMCA, for donor designated gifts, to use only the income from such gifts, and not the principal, for existing and new programs, scholarships and meeting community needs now and in the future.

## **THE YMCA ENDOWMENT FUND**

The YMCA Endowment Fund is overseen by the Endowment Development Fund Committee, but managed and invested by local professional investors. The fund has been in existence for numerous years now.

The YMCA Board of Directors has the responsibility for approving all policies as they relate to the Endowment Fund; the Endowment Development Fund Committee has the responsibility for overseeing the management and investment of the fund by professional fund managers, who operate under established and approved guidelines.

**The Henderson County Family YMCA has been approved by the IRS as a public non-profit charity under the Internal Revenue Code, as an organization described in section 501 (c) (3). Gifts to establish or increase a Philanthropic Fund, within the YMCA, are tax deductible, subject to limitations imposed by the code.**

**Donors receive a charitable tax deduction for the year in which the gift is made, even if the distribution of the gift from the fund takes place in future years. If the gift consist of appreciated securities, capital gains taxes may be avoided. Prospective donors should contact their tax advisor, lawyer, financial planner or trust managers for further details and benefits of making a gift to the YMCA Endowment Fund.**

**Please contact YMCA CEO Sheldon Booze for further information.**

## **A GIFT FOR THE NEXT GENERATION**

**In a world where so much comes and goes so quickly, the Henderson County Family YMCA has lasted for 116 years ! The Y is community and volunteer based, is professionally managed, and is positioned to respond and meet the changing needs and conditions of our community, now and in the future.**

**Won't you please give a gift today, to ensure the continued development of leaders for our next generation, by perpetuating the work of the Henderson County Family YMCA?**

## **PAST ESTATE & TRUST GIFTS TO THE YMCA**

**These individuals and families have enabled previous and present generations of youth and families from Henderson County, to benefit from their caring and generous planned gifts ! Thomas Lambert Trust; George A. Hoffman Trust; Julia B. Hayes Estate; Carlton Klutey Estate and Amelia K. Krieger Estate.**

## **RECOGNITION OF GIFTS**

**Gifts to the YMCA Endowment Fund will be recognized and listed in one of the qualifying categories, unless the donor indicates otherwise. Multiple year gifts will be recognized by an asterisks \***

**Gifts from Wills, Trusts or Estates will be recognized in the year they are received.**

**Gifts of Property, Jewelry, etc.. will be recognized at the time they are sold.**

**\*Gifts of \$1,000 or more will be recognized on the Donors Wall in the main lobby of the YMCA.**

**DONOR: \$1 - \$99**

**PATRON: \$100 - \$499**

**SUSTAINER: \$500 - \$999**

**PARTNER: \$1,000 - \$2,499\***

**BENEFACTOR: \$2,500 - \$4,999**

**AMBASSADOR: \$5,000 - \$9,999**

**PHILANTHROPIST: \$10,000 +**

## **ENDOWMENT GOAL**

**It is the hope of the YMCA, with the support of the YMCA Board of Directors, Staff, Members, Individuals, Families and Community Businesses, thru annual gifts and long range financial planned gifts, that \$1 million dollars in principal can be realized no later than the year 2020. This amount would help raise over \$100,000 per year in interest, that would help continue with providing youth and family scholarships; help support existing and new programs; provide services for the needy, and be less dependent on external funding in the future.**

**HENDERSON COUNTY FAMILY YMCA  
HERITAGE CLUB MEMBERSHIP**

**This is to inform you that I now or will in the future qualify for membership in the Y's Endowment Heritage Club, for which I have taken the following action to benefit the Henderson County Family YMCA. Please indicate below which gift option(s) you have completed. Gifts will be recognized in YMCA written materials, unless the donor indicates their wishe not to have their gift recognized.**

Will Bequest  Life Insurance Policy  Property/Jewelry,etc...  Charitable Trust  
 Gift Annuity  Outright Gift Enclosed:\$ \_\_\_\_\_ (restricted for: \_\_\_\_\_)

Name(s) \_\_\_\_\_ Phone \_\_\_\_\_

Mailing Address \_\_\_\_\_ Zip \_\_\_\_\_

Signature Required \_\_\_\_\_ Date \_\_\_\_\_

Would you like to receive information on Estate Planning or Will Development?  yes  no

**THANK YOU FOR YOUR GENEROUS GIFT AND COMMITMENT TO OUR AREA YOUTH !**