

# THE HERITAGE CLUB

The Heritage Club is made up of individuals and families who believe in the mission of The Family YMCA, and want to ensure that its programs and services will be continued for future generations. Members of the Heritage Club have included the Y in their estate plans and/or designated gifts to the endowment fund, building long-term financial stability to support our work.

There are two ways to become a Heritage Club member. You can provide an outright gift to the Y's endowment fund, suggested minimum amount of \$1500, or you can name the Y in your estate plans, suggested minimum amount of \$5000.

Please notify the Y if you are including us in your estate plans so that we may thank you today with an invitation to our annual dinner, and by commemorating your gift with a "leaf" on our Giving Tree.

## Ways to Qualify for the Heritage Club Include:

### Outright Cash Gift Today including Pre-tax Retirement Contributions

Make a meaningful gift and take a charitable deduction as provided by law. A gift of \$1500 is suggested for Heritage Club membership. If you prefer, we can arrange installment payments.

### Bequest in Will

Include The Family YMCA in a will and reduce estate taxes. Fixed amounts, assets or percentages of the estate may be specified. Another option is to name the Y as a recipient of the remainder of an estate after all other expenses and specified contributions.

### Stocks, Bonds, Saving Bonds

Contribute appreciated assets, such as stock, real estate or personal property to the Y and receive a charitable deduction equal to the current value of the assets without capital gains tax; suggested minimum amount of \$2500.

### Life Insurance

Purchase a life insurance policy naming the Y as the beneficiary, and take a charitable deduction equal to the premium amount.

### Trusts

Establish a form of charitable trust and/or annuities that provide the donor with a fixed or variable lifetime income and receive a charitable deduction at the same time.

### Real Estate

Donate a home or real estate to the Y, enjoy the benefits of ownership for life and recognize a charitable deduction immediately.

### Retirement Plans

Name the Y as a full or partial beneficiary of your IRA or qualified retirement plan to avoid both potential income and estate taxes on these gifts. Consider an IRA rollover to the Y if you must take a required minimum distribution. There might be a tax advantage.

# MY RESPONSE

I am pleased to inform you that I qualify for membership in the Heritage Club and I am honored to be added to its membership.

I have included The Family YMCA in the following:

Direct Gift       Life Insurance  
 Bequest         Retirement Funds  
 Other: \_\_\_\_\_

Please call me, I'd like to talk with someone in regard to the Heritage Club.

Name \_\_\_\_\_

Address \_\_\_\_\_

City /State /Zip \_\_\_\_\_

Phone \_\_\_\_\_

E-Mail \_\_\_\_\_



PLEASE RETURN TO:

THE FAMILY YMCA  
Attn: Chris Daniels, CEO  
1450 Iris Street  
Los Alamos, NM 87544  
Ph: (505) 662-3100

**Donors should seek the advice of their legal and financial advisors when deciding upon a planned gift.**

# THE FAMILY YMCA

was established in 1955 by volunteers who recognized the need for a place where families could recreate together. At the time, Los Alamos was a "closed" community and the lack of family resources was a community concern.

Volunteers petitioned Congress to grant the establishment of the organization. This carved out a place in history for our Y as the first YMCA established by an Act of Congress.

Our Y was also the first "family" YMCA in the country, and as such we were granted the name, "The Family YMCA." There are now over 2,700 YMCA's in the USA that serve families and also include the word "family" in their name, but our Y was the first.

Since 1955, we have touched thousands of lives, and we have lasted. We have been led by a volunteer Board of Directors since we started.

## Our mission

is to build individual, family and community strength by focusing on youth development, healthy living and social responsibility.

## Our purpose

is to provide opportunities for all ages to learn new skills, be given opportunities to succeed and connect with community. We believe these experiences build character and help us all grow in spirit, mind and body.

**As a 501c3 charitable, nonprofit organization, we ensure access for all through financial assistance scholarships.**

# EVERYONE IS WELCOME!

**Heritage Club members ensure that our programs, traditions and mission will continue for future generations.**

**While the Y's Annual Campaign addresses current scholarship needs, endowment funds are an investment for what lies ahead.**

Your endowment gift is one of the most important things you can do for others in your lifetime. Your gift is a way to ensure that good work keeps on going. You may gift a program that is close to your heart or leave a general contribution in support of our work.

The Family YMCA is independent and makes its own decisions based on local needs. This means your gift will benefit your community directly... your neighborhoods, your friends.

Families you may or may not know will receive the rewards of your choice for years to come.

"My father was the 15th of 16 kids, and he grew up using a Y. He maintained that the Y was the only place he could afford to go besides church.

"I grew up here in Los Alamos, and went to this Y frequently. We contribute to ensure that the Y remains the preeminent youth organization in Los Alamos."

**-Roger Waterman**

**THE FAMILY YMCA** 1450 Iris Street  
serving Los Alamos & Los Alamos, NM 87544  
Rio Arriba counties 505.662.3100  
laymca.org



FOR YOUTH DEVELOPMENT®  
FOR HEALTHY LIVING  
FOR SOCIAL RESPONSIBILITY

## GIFTS IN THE PRESENT FOR THEIR FUTURE

## Heritage Club THE FAMILY YMCA



"The Family YMCA has had a profound influence on my family for almost 50 years. We started a trust to benefit the Y."  
- John Elder, Los Alamos