



FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

LAKE SUPERIOR YMCA HERITAGE FOUNDATION

LETTER OF INTENT – PLANNED GIFT

Thank you for sharing the news of your planned gift to the Lake Superior YMCA.
Your gift will ensure that the Y's impactful work will continue for many years into the future.

Please take a moment to fill out this form regarding your gift.

Printed name _____ Birthdate _____

Address _____

City, State, Zip _____

Home Phone _____ Cell Phone _____

Email _____

Printed name _____ Birthdate _____

Address _____

City, State, Zip _____

Home Phone _____ Cell Phone _____

Email _____

Family Member Contact _____ Relationship _____

Phone _____ Email _____

Estate attorney/Professional Advisor _____ Phone _____

Email _____ Firm Name _____

Please designate my/our gift to the following:

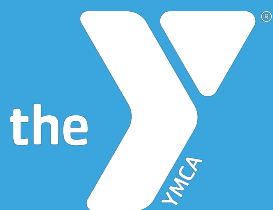
☐ **Lake Superior YMCA Heritage Foundation (Endowment Fund)**

☐ **Branch or Camp** _____

☐ I wish to establish a new, named fund through the Lake Superior YMCA Heritage Foundation with my deferred gift. Eligible for gifts valued at \$25,000 or more.

Additional Information

TURN OVER



**LAKE SUPERIOR YMCA
HERITAGE FOUNDATION**
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The gift is in my/our:

- ☐ Will ☐ Life insurance policy
- ☐ Trust ☐ Retirement account
- ☐ Other _____

Projected gift value:

This information is used for future endowment planning purposes only. The YMCA understands that the projected value of some planned gifts will change over time.

- ☐ The approximate value of the gift today is \$ _____
- ☐ I prefer not to disclose an amount at this time.

May we list you as a member of the YMCA Heritage Foundation Society?

- ☐ Yes, please feel free to publish my name in recognition of my gift and as motivation for others to leave planned gifts to the YMCA.
- ☐ I/we wish my/our names to appear as: _____
- ☐ No, please keep me anonymous and do not list me as a member of the Heritage Foundation Society in the annual report and other materials.

Change of Circumstances

Should the purpose for which this gift is established cease to exist or become difficult to fulfill, the Lake Superior YMCA may modify the purposes or re-direct use, as deemed appropriate and generally consistent with the Donor's original charitable intentions. The name of the honoree(s) shall remain associated with this gift.

Signature _____ Date _____

Signature _____ Date _____

Designate your gift to:

Lake Superior YMCA Heritage Foundation
302 West 1st Street
Duluth, Minnesota 55802
Federal Tax Identification: 20-0956455

On your estate paperwork, please indicate the camp or branch your planned gift will be directed to.

The Lake Superior YMCA is a tax-exempt, nonprofit organization under section 501(c)(3) of the Internal Revenue Code.

Return this form to:

Christine Paliewicz
Lake Superior YMCA
302 West 1st Street
Duluth, Minnesota 55802

(E) cpaliewicz@lakesuperiorymca.org
(P) (218) 722-4745 x126

Please include, or forward when available, copies of relevant portions of your estate planning documents and/or beneficiary designations.

Thank you for supporting strong communities across the generations through your visionary gift.