



Letter of Intent — Planned Gift

Thank you for sharing the news of your planned gift to the YMCA of the North.
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:

YMCA of the North

☐ Endowment Fund ☐ Unrestricted

Community Hub or Camp: _____

☐ Endowment Fund ☐ Unrestricted

☐ **I wish to establish a new, named fund with my deferred gift.** Eligible for gifts valued at \$10,000 or more.

Additional Information

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The gift is in my/our:

☐ Will ☐ Life insurance policy ☐ Trust ☐ Retirement account/IRA ☐ 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 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 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 YMCA of the North 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:

YMCA of the North

651 Nicollet Mall, Suite 500
Minneapolis, Minnesota, 55402

Federal Tax Identification # 45-2563299

On your estate paperwork, please indicate the camp or community hub your planned gift will be directed toward.

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

Return this form to:

Shane Hoefer
YMCA of the North
Planned Giving
651 Nicollet Mall, Suite 500
Minneapolis, MN 55402

(E) plannedgiving@ymcanorth.org
(P) 651-773-2646

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 investment in the YMCA.

Turn Over