

*Issues that  
Central Bucks Family YMCA  
is Addressing*

*Personal and family stress*

*Productive outlets for teens*

*Kids home alone after school*

*An exploding senior population*

*Preventive health and fitness vs.  
costly therapy treatment*

*Single parents*

*Youth drug and alcohol use*

*Obesity in children and adults*

*Family togetherness*

*Youth leadership training*



2500 Lower State Rd. • Doylestown, PA 18901 • 215-348-8131 • [www.cbfamilyymca.org](http://www.cbfamilyymca.org)

**We build strong kids, strong families, strong communities**

Central Bucks Family YMCA is a charitable, nonprofit organization whose purpose is to improve the quality of community life. The YMCA strengthens the spirit, mind and body of all people. We build character by promoting the values of caring, respect, honesty and responsibility.

*A Word about Bequests*

Charitable gifts given through a bequest in your will are an excellent way to honor the charity of your choice. Like other forms of charitable giving, a bequest in your will can reduce taxes on your estate and can be made in the form of a specific dollar amount, a certain asset or a portion of the overall estate. Here are three samples of the language you can use:

**A) A specific bequest to the Central Bucks Family YMCA Endowment Fund:**

*"I give, devise and bequest to the Central Bucks Family YMCA Endowment Fund located in Doylestown, PA, \$ \_\_\_\_\_"*

**B) Percentage bequest to the Central Bucks Family YMCA Endowment Fund:**

*"I give, devise and bequest to the Central Bucks Family YMCA Endowment Fund located in Doylestown, PA, \_\_\_\_\_ percent of my residuary estate."*

**C) Residual bequest to the Central Bucks Family YMCA Endowment Fund:**

*"All of the residue of my estate, including real and personal property, I give, devise and bequest to the Central Bucks Family YMCA Endowment Fund located in Doylestown, PA."*



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The official registration and financial information of the Central Bucks Family YMCA may be obtained from the PA Department of State by calling toll-free, within PA, 1-800-732-0999. Registration does not imply endorsement.



*Your Invitation to Join*

**The  
Heritage Club**

*...Leaving a Legacy  
to Support Your Community*

**A Recognition Society  
of Donors to the  
Endowment Program**

**Central Bucks Family YMCA**

## *The Heritage Club*

The Heritage Club is a group of people who want to ensure that the Y continues to serve future generations. It is a program of the Y intended to promote long-term stability. This is not an appeal for funds now – but a suggestion that you may want to include the YMCA in your long-range plans. By doing this now, the possible tax and current income advantages to you can increase the value of your estate, enabling you to do much more than you ever dreamed.

## *An Anchor for Your Community*

Central Bucks Family YMCA is one of our most unique and valuable community assets. Through more than 300 programs and an extensive campus, we bring together thousands of people of diverse backgrounds and ages.

## *Assuring the Future of Your Community*

The Endowment Fund exists for friends and Y members to make a lasting contribution to benefit our community. The principal of your deferred gift will be invested and the income will be used each year to support Y programs.

## *Programs You Can Support Through Your Commitment*

You may earmark your endowment commitment for one of the following purposes: Unrestricted; Program Support and Development; Staff Training; Maintenance and Equipment; Scholarships for needy children and families.

## *Join Others as a Member of the Heritage Club*

### **An Outright Gift of Cash, Securities, Property**

Contributing appreciated assets creates current income tax savings and possible capital gains savings.

### **Life Insurance Policy**

Contributing an existing policy and possibly annual gifts to cover premiums or naming the Y in a new policy makes possible a large future gift and possible current and future income tax savings.

### **A Bequest in Your Will**

Makes possible a substantial charitable gift in memory of an individual and creates estate tax savings. (See back panel)

### **Charitable Remainder Trust/Annuity**

Allows you to give a charitable gift, get a tax deduction and generate income for you or your family. These plans work especially well when the donation is appreciated property (e.g., real estate or stock) because they eliminate the capital gains tax. Usually the income is considerably higher and can be fixed at an attractive rate.

### **Memorial/Honorary Gifts**

A loved one can be remembered forever through contributions to the Endowment Fund. A special personal achievement may be recognized though a donation to the Fund.

*Note: this information is general in nature. Before making any decision you may wish to consult, in private, with our planned giving staff, an attorney or financial advisor.*

*Please let us know if you qualify as a member of the Heritage Club - A Recognition Society of Donors to the Endowment Program.*

It is the COMMITMENT RATHER THAN THE AMOUNT that is the basic factor in qualifying as a Heritage Club member. You may qualify yourself as a member of the Heritage Club. If you already qualify for membership in our Club, please let us know. (All information is held in strictest confidence.) Those who have informed us of their commitment to provide a deferred gift are automatically members of the Heritage Club.

To: Gene Smith, Executive Director/CEO  
Central Bucks Family YMCA:

This is to inform you that I now qualify as a member of the Heritage Club by having fulfilled one of more of the following:

- I have made or revised my will directing a bequest to the YMCA.
- I have created a charitable remainder trust or other form of annuity or life income program to benefit the YMCA.
- I am making an outright gift of securities, property or cash to the YMCA.
- I have named the YMCA as primary or secondary beneficiary or owner of a new or existing life insurance policy.

*Please Print*

My Name \_\_\_\_\_

My Address \_\_\_\_\_

My Telephone or Email Address \_\_\_\_\_

- I would like further information about gifts that provide me with income for life.
- I would like to discuss one of the ways I can increase my personal wealth and at the same time help the Y's endowment.

*Please detach this form and mail in the enclosed self-addressed envelope to:*

**Gene Smith, General Director/CEO, Central Bucks Family YMCA,  
2500 Lower State Road, Doylestown, PA 18901.**

*For further information you are invited to call Gene at 215-348-8131, x 133, email him at [esmith@cbfymca.org](mailto:esmith@cbfymca.org) or visit our website, [www.cbfymca.org](http://www.cbfymca.org) to submit this information.*

*Members are invited to a complimentary annual Heritage Club dinner, usually held at Doylestown Country Club, and are listed in our Annual Reports. Please let us know if you wish to remain anonymous.*