



# Letter of Intent — Planned Gift

Thank you for sharing the news of your planned gift to the Kenosha 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:

## KENOSHA YMCA ENDOWMENT

Unrestricted

I wish to restrict my gift to the following program(S). *Eligible restricted gifts must have a value of \$10,000 or more.*

Please restrict my gift to the following program(s)/expense(s):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Turn Over

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## The gift is in my/our:

- Will  Life insurance policy  Trust  Retirement account/IRA  Donor Advised Fund  
 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 KENOSHA 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:

**KENOSHA YMCA**  
7101 53rd St.  
Kenosha, WI 53144

Federal Tax Identification # 39-0826296

On your estate paperwork, please indicate any restrictions of your planned gift.

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

## Return this form to:

Chris Finkel  
KENOSHA YMCA  
Development Director  
7101 53rd St.  
Kenosha, WI 53144

(E) cfinkel@kenoshaymca.org  
(P) 262-564-6813

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.**