

MEMBERSHIP APPLICATION

YOUR MEMBERSHIP

(All information is held in the strictest confidence.)

I am happy to inform you that I now qualify for the Heritage Club by:

- I have made a bequest to the Charlotte County Family YMCA in my will/trust.
- I have made an outright gift of at least \$10,000 to the Charlotte County Family YMCAs Endowment Fund.
- I have named the YMCA as a beneficiary of life insurance policy.
- Other: _____

All Heritage Club Members will be recognized on the Heritage Club Honor Roll on a perpetual basis.

- Do not publish my name on the Heritage Club Honor Roll.

Name(s): _____

Address: _____

City: _____ State: _____ Zip: _____

E-Mail: _____

Signature: _____

Date: _____

Please mail to:

Paul Versnik, CEO
Charlotte County Family YMCA
1777 Tamiami Trl Suite 407
Port Charlotte, FL 33948
(941) 629-0909

OUR YMCA BRANCHES



Franz Ross Park (941) 629-9622

- Fitness Facility
- Indoor Heated Pool & Spa
- Kiddie Kollege Summer Camp
- Child Development Center



Edgewater (941) 629-2220

- Child Development Center
- Before/After School Care
- Kiddie Kollege Summer Camp
- Y READS Program



Punta Gorda (941) 505-4000

- Fitness Facility
- Multi-Purpose Room
- Kiddie Kollege Summer Camp
- Child Development Center



Charlotte Regional (941) 916-9227

- Child Development Center
- Non-Traditional hours
- Kiddie Kollege Summer Camp
- Safe indoor/outdoor areas



Bayfront Center (941) 979-1493

- View of Charlotte Harbor
- Social Programs
- Rentals Available
- Large Kitchen



Dotzler (941) 629-9622

- 18 acres on Charlotte Harbor
- Summer Camp
- Rentals Available
- Tower Climb & Kayaking



North Port (941) 429-2269

- Fitness Facility
- Outdoor Heated Pool
- Kiddie Kollege Summer Camp
- Child Development Center & VPK



FOR YOUTH DEVELOPMENT
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

YMCA HERITAGE CLUB



By becoming a Heritage Club Member, you are making a commitment to the YMCA and to the community. Contributions create an everlasting legacy to future generations. Be a part of our future.

www.CharlotteCountyYMCA.com



THE HERITAGE CLUB

The Heritage Club is the name given to recognize those who have chosen to give of themselves to the Charlotte County Family YMCA through

their estate plans, wills, trusts or direct giving. Members of the Heritage Club have, through their commitment to the YMCA, earned the right to be recognized for their selfless act of helping to ensure a better future for the Charlotte County Family YMCA.

To become a member, just complete the Heritage Club Membership Application that is enclosed, notifying the YMCA that you have included the YMCA in your estate or one of the other forms of gifts listed. No other information will be needed unless you wish to disclose it.

ENDOWMENT FUND COMMITTEE MEMBERS

Jimmy Dean - Chairman
Harbor Style Magazine

Bill Buckley - Vice Chairman
Ameriprise Financial

Robert Dickinson - Treasurer
Personal Financial Consultant

Steve Schwarz II - Secretary
Schwarz & Schwarz, P.A.

Steve Wierhake
Clear View Financial Services

YMCA Mission Statement:

To put Christian principles into practice through programs that build healthy spirit, mind & body for all.



ENDOWMENT

Simply stated, an endowment is a managed account where the principal is never spent. The earnings derived from the fund are paid out, through the trustees to the grant recipients of the fund. With an endowment working for the Charlotte County Family YMCA, there will always be income from that fund providing our community with a future.

Why an Endowment?

In 2003 the Board of Directors of the Charlotte County Family YMCA recognized the benefits an endowment could provide to our local YMCA. Their vision was to ensure the YMCA a source of funds for special projects to enhance the mission of the YMCA.

How can I donate to the YMCA? I don't have that kind of money.

This is where the endowment can work for you and for the Charlotte County Family YMCA. Your gift to the YMCA may be part of a will or testament, a direct cash gift or inclusion in a new or existing life insurance policy. You need not make any gift now other than make a "pledge" to the fund. In this way even your own legacy will reach into the future with the YMCA.

Are there tax benefits?

By selecting the YMCA, you'll find that each Gifting Program may have varied estate and/or income tax benefits to you and your heirs.

You should consult your estate planning attorney and tax advisor for specific information and guidance.

GIFT PROGRAMS

Outright Cash Gift

A direct gift of at least \$10,000 of cash may be the most convenient way for you to make a contribution to the YMCA Endowment Fund.

"Step Up" Program

For those wishing to "Step Up" as a member of the Heritage Club through a 5 Year Pledge commitment. A minimum of a \$10,000 pledge with a payment schedule that meets your financial needs. Balance is due 5 years from a commitment sign-up.

Life Insurance

When the added protection of an insurance policy is no longer needed, transferring the policy's ownership to the YMCA can result in tax benefits for you and a generous gift for the YMCA. The YMCA needs to be named as the owner and beneficiary for this to work. It may also be possible to take out a new policy with the YMCA as a beneficiary.

Wills & Bequests

A gift to the YMCA through your will and bequest permits you to retain all of your assets during your lifetime and/or the life of your spouse. Designation may be for a percentage of your estate or for a specific amount.

Charitable Lead Trust

A Charitable Lead Trust may be appropriate if you have ample income now, but desire to retain ownership of the trust principal to meet financial goals for your family. Income will be directed to the YMCA Endowment Fund for a specific term of the trust, after which time the principal will return to you or your designated survivors.

Charitable Remainder Trust

A Charitable Remainder Trust can provide income to you and your spouse as long as either of you live. Thereafter, the trust principal will go to the YMCA Endowment Fund.

www.CharlotteCountyYMCA.com