

Please consider including the Boys & Girls Clubs and YMCA of Greater Waterville at the Alfond Youth & Community Center during your estate planning.

Become a member of the AYCC Founders Club by including the AYCC in your Estate Plan and Will to

- Ensure on-going support to our worthy cause
- Provide services to youth in need into the future
- Increase benefits to you by planning income to you and your heirs along with your charitable gift.

It will be an honor to have you as part of our Founders Club as we continue to create opportunities for children now and into the future. Please consider a legacy gift

today and join the over 100 members that have already made the commitment.



What is Planned Giving?

Often referred to as gift or legacy giving, it enables philanthropic individuals to make larger gifts to charitable organizations than could be made from ordinary income. Some planned gifts provide life-long income to the donor, others use estate and tax planning to provide for charity and heirs in ways that maximize the gift and/or minimize its impact on the donor's estate.

By definition, a planned gift is any major gift, made in lifetime or at death as part of a donor's overall financial and/or estate planning. These include gifts of equity, life insurance, real estate, personal property, or cash.

How To Give	How it Works	Benefits
Bequest	<ul style="list-style-type: none"> • Designate AYCC as beneficiary by will, trust or other instrument 	<ul style="list-style-type: none"> • Estate tax charitable deduction • Life use and ownership of property
Charitable Gift Annuities	<ul style="list-style-type: none"> • Transfer cash and/or property to AYCC • AYCC pays fixed income for life from annuities 	<ul style="list-style-type: none"> • Charitable tax deduction • Fixed income for life, possibly tax-free • Avoid some capital gains tax
Charitable Remainder Trust	<ul style="list-style-type: none"> • Transfer cash and/or appreciated property to fund AYCC • Your trust sells property tax-free and provides income for life or a term of years 	<ul style="list-style-type: none"> • Charitable tax deduction • Income for life or a term of years • Possible income growth • Avoid capital gains tax
Charitable Lead Trust	<ul style="list-style-type: none"> • Transfer cash/property to a lead trust that makes a gift to AYCC for a number of years • You receive a charitable deduction • Your family receives remainder with sizable tax savings 	<ul style="list-style-type: none"> • Gift or estate tax deduction • Asset and appreciation passes to family at a reduced cost
Life Estate Reserved	<ul style="list-style-type: none"> • AYCC accepts gift of home or farm • You retain use of property for life 	<ul style="list-style-type: none"> • Tax deduction for remainder of value • Preserve lifetime use of property



CONFIDENTIAL ENROLLMENT FORM

In consideration of the impact that Boys & Girls Clubs and YMCA of Greater Waterville has on the lives of young people and adults, I/we have made provision for a gift to the Club in my/our estate plan. Understanding that the Club Trustees have established The Founders Club to recognize individuals who made such a commitment, I/we are pleased to authorize the Club to include me/us as a member of The Founders Club. Revised 1/10/13

Please print or type

Title	Name	Spouse
Date of birth	Spouse Date of birth	
Address		
City	State	Zip Code
Name(s) for recognition purposes		
Daytime Phone ()		Evening Phone ()
<small>(Please include area code with telephone numbers)</small>		
E-Mail Address		

Relationships with Boys & Girls Clubs and YMCA of Greater Waterville

- | | | |
|--|---|------------------------------------|
| <input type="checkbox"/> Board of Directors <i>(current or past)</i> | <input type="checkbox"/> Parent/Grandparent | <input type="checkbox"/> Volunteer |
| <input type="checkbox"/> Alumnus | <input type="checkbox"/> Friend | <input type="checkbox"/> Staff |
| <input type="checkbox"/> Other _____ | | |

Gift Information

I/we qualify for The Founders Club through the following planned gift:

- | | | |
|--|---|---|
| <input type="checkbox"/> Bequest (or Living Trust) | <input type="checkbox"/> Charitable Remainder Annuity Trust | <input type="checkbox"/> IRA/Retirement Plan Beneficiary |
| <input type="checkbox"/> Dollar amount | <input type="checkbox"/> Charitable Remainder Unitrust | <input type="checkbox"/> Gift of Residence or Farm w/Retained Life Estate |
| <input type="checkbox"/> Stock or property | <input type="checkbox"/> Deferred Charitable Gift Annuity | <input type="checkbox"/> Charitable Lead Trust |
| <input type="checkbox"/> Percentage bequest | | <input type="checkbox"/> Life Insurance Policy |
| <input type="checkbox"/> Residuary bequest | | |
| <input type="checkbox"/> Charitable Gift Annuity | | |
| <input type="checkbox"/> Cash | | |

Please indicate the approximate current market value of the planned gift named above:

\$ _____ (Optional. Will be treated as confidential.)

The gift is: Unrestricted Restricted as follows: _____

I/we wish to remain an anonymous member of The Founders Club.

Signature: _____ Date: _____

Reported by: _____

