



### WHO WE ARE

The Y is a cause-driven organization focused on three key areas: **youth development, healthy living and social responsibility**. We believe a strong community can only be achieved when we invest in our kids, our health and our neighbors.

Our programs, services, and initiatives enable youth to realize their potential, offer families ways to have fun together, empower people to be healthier in spirit, mind and body, welcome and embrace newcomers and help foster social responsibility.

### OUR CAUSE

**At the Y, strengthening community is our cause.** Every day, we work side-by-side with our neighbors to make sure that everyone, regardless of age, income or background, has the opportunity to learn, grow and thrive.

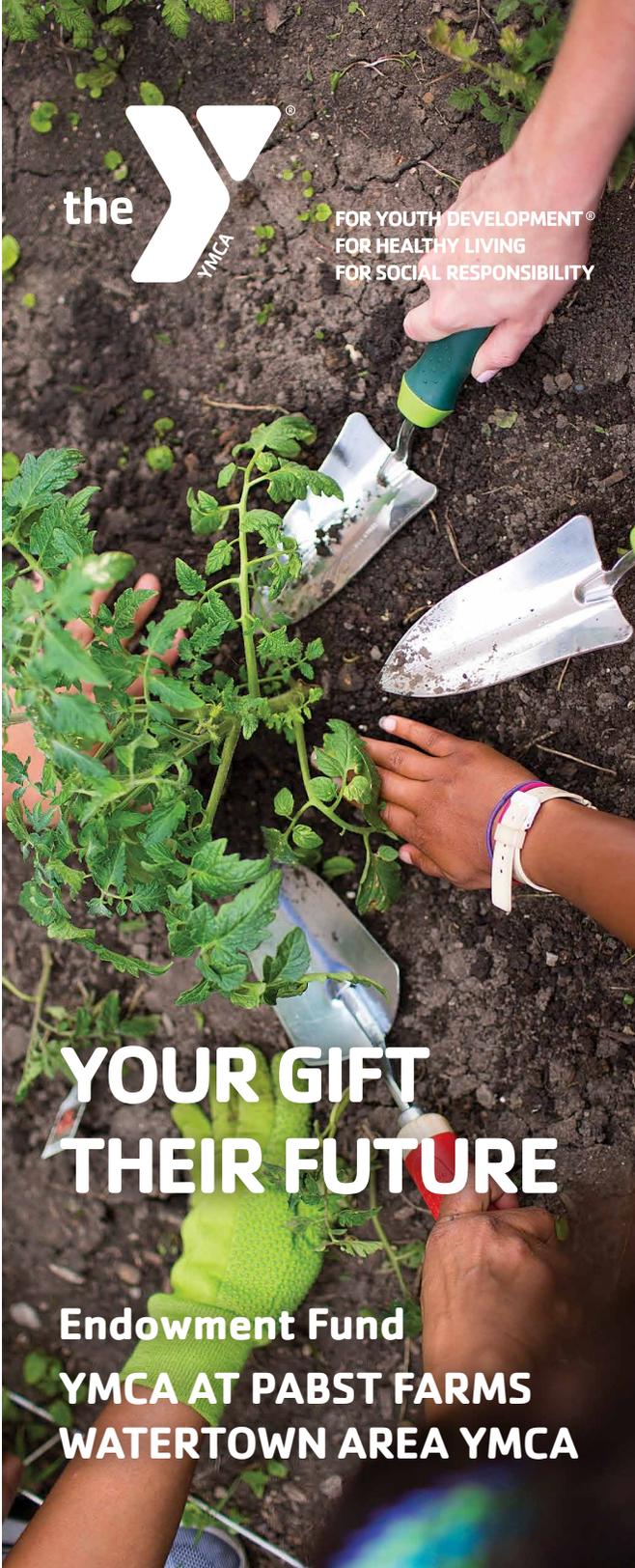
### OUR DESIRED IMPACT

**Through involvement at the Y, people in our communities are spiritually, mentally and physically healthy.** Our youth feel safe and empowered to lead significant lives. All relationships are nurtured and people feel connected to one another and responsible in building a sense of community for all.

**The Y impacts thousands of lives by addressing critical needs facing our community, and with your help, always will.**

**YMCA AT PABST FARMS**  
1750 East Valley Road  
Oconomowoc, WI 53066  
262-567-7251 | [www.glcymca.org](http://www.glcymca.org)

**WATERTOWN AREA YMCA**  
415 South Eighth Street  
Watertown, WI 53094  
920-262-8555 | [www.glcymca.org](http://www.glcymca.org)



# YOUR GIFT THEIR FUTURE

## Endowment Fund YMCA AT PABST FARMS WATERTOWN AREA YMCA

Life is a journey, each of us on a distinctive path. Our legacies speak for us – sharing our traditions, our beliefs and our accomplishments. For many, a portion of their lifetime success is defined by their connection with the principles and practices of the Y.

For over 90 years in Oconomowoc and 8 years in Watertown, in timely and innovative ways, the Y has served our community, addressing our area's most pressing needs. The Y continues to impact lives, and with your help, the Y always will.

When contemplating the pathway that will lead to your personal legacy, you can feel confident that a contribution to the Y will be a gift of a lifetime – building stronger communities today and in the future.





# ENVISION YOUR LEGACY

## THEN MAKE IT COME TRUE THROUGH THE Y

Endowment gifts share a vision for the future and can sustain youth programs, family programs and community programs.

### GIVING IS UNIQUELY REWARDING

Those seeking to have an impact on those who need us most will find resonance with the Y's breadth of programs and services. The Y uses contributions to meet the ever-changing needs of under-served people of all ages, religions, ethnicities, and backgrounds. If you're inspired by a specific interest, your gift may be designated to support life-changing initiatives that address that need. You may also endow a specific Y project or the general endowment fund.

### GIVING IS AS INDIVIDUAL AS YOU

The Y recognizes that no two donors and no two gifts are alike in their aspirations and motivations. Through a deliberate and thoughtful process, Y professionals will work with you and/or your advisors to create a giving opportunity that speaks to you and your family's unique desires.

### GIVING IS TRUSTWORTHY AND FLEXIBLE

The Y takes seriously the trust our donors place in us. Gifts to the Endowment Fund are kept in perpetuity and invested to generate income that is used to further the work of the Y. How a particular donor chooses to make a gift varies; whether an immediate or planned gift, all that is necessary is a commitment to the Y's Endowment. To ensure your gift is in keeping with your estate and financial needs, the Y encourages donors to discuss contributions with their family legal and/or financial advisors.

**"My late husband, Lou, and I wanted to make a significant and enduring contribution to the organization that has meant so much to our family over the years. We felt it was important that our Y remain active in our community for our grandchildren for years to come. Once we made our gift decision, the Y staff made the endowment process effortless."**

- Jacky Morgan,  
Heritage Club Member

**"Planning for the future—especially a future that you are not part of—is a thoughtful business. But we look at the Y like we do all our investments... a proven track record and a great outlook for the future. Through life insurance, we have been able to provide support that far surpasses our current giving ability, while in no way lessening the estate we wish to pass to our children."**

- Jeff Senglaub, Heritage Club Member



### HERITAGE CLUB

Individuals who have made a meaningful gift to the YMCA Endowment Fund are recognized for their generosity and become members of the Heritage Club. Becoming a member of the Heritage Club requires a commitment, which now, or in the future, will add to the Y's Endowment Fund. Heritage Club members are recognized on a plaque. Planned giving opportunities to qualify for Heritage Club include:

#### OUTRIGHT GIFTS

Immediate gifts of cash, appreciated securities, real or tangible property are welcome additions to the Y Endowment.

#### WILLS AND REVOCABLE LIVING TRUSTS

A gift to the Y by will or living trust permits you to retain all your assets during your life. Designations may be for a percentage of your estate, a specified amount or for the residue of your estate.

#### CHARITABLE TRUSTS

Charitable trusts can provide life income to you and/or a loved one. After your lifetime(s), the trust principal passes to the Y Endowment. You may name other charities as principal recipients as well.

#### APPRECIATED ASSETS

Contribute appreciated assets, such as stock, real estate or personal property to the Y and receive a charitable deduction equal to the current value of the assets without capital gains tax.

#### LIFE INSURANCE

Purchase a life insurance policy naming the Y as the beneficiary, and take a charitable deduction equal to the premium amount. Several plans are available in which a new policy can be fully paid in a period of five to seven years.

#### BENEFICIARY DESIGNATIONS

You may add the Y as a revocable beneficiary of your qualified IRA, pension plan, bank account or insurance policy.