



"The Y has been a cornerstone of our family's life. As a dedicated employee for my entire career, I've witnessed firsthand the positive impact our programs have on countless families in our community. I'm passionate about ensuring these programs continue to thrive and provide valuable resources for generations to come. My deep gratitude for the Y drives my commitment to its enduring success."

– Ronnie & Meghan Stone

WHO WE ARE

The Y is a cause-driven charitable 501(c)(3) organization focused on: 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 and empower people to be healthier physically, mentally, socially and emotionally.

OUR CAUSE

At the Y, strengthening community is our cause. Every day, we strive to make sure that everyone, regardless of age, income or background, has the opportunity to participate in Y activities and, recreate, grow and thrive together.

OUR IMPACT

The Y is committed to strengthening our community based on the unique needs of those we serve. With a focus on youth development, healthy living and social responsibility; we have been successful creating positive opportunities for children, teens, families and adults of all ages.

YOUR NEXT STEPS

Visit www.sevymca.org/planned-giving
or scan the QR code



YMCA CONTACTS

Connie Maguire, CFRE
Executive Vice President of Philanthropy
cmaguire@sevymca.org

Dani Hutchison, Chief Development Officer
dhutchison@sevymca.org

The Southeast Ventura County YMCA encourages all donors to discuss their giving plans with their legal and/or financial advisors.

SIMI VALLEY FAMILY YMCA

3200 Cochran St.
Simi Valley, CA 93065
(805) 583-5338 | www.sevymca.org

YARROW FAMILY YMCA

31105 Thousand Oaks Blvd.
Westlake Village, CA 91362
(818) 707-9622 | www.sevymca.org

Please visit our website at www.sevymca.org
or call 805.497.3081 for more information.

Southeast Ventura County YMCA



PLANNED GIVING PROGRAM



Y FOREVER

Since 1964 the Southeast Ventura County YMCA has provided the community with a myriad of programs and activities aimed at improving the quality of physical, mental, social and emotional life for all that participate. The Y's areas of focus including youth development, healthy living and social engagement have had a profound impact on the community enhancing the quality of life for all. Each Y is a hub of its local community welcoming all members of the community, promoting inclusion, shared values and social engagement.

Through pledging a planned gift to the Y donors are investing in the Y's future helping to ensure that future generations will have a Y to support their personal growth throughout their lives just as those who do today. Please join us in making the Y forever.



ENVISION YOUR LEGACY

THEN MAKE IT COME TRUE THROUGH THE Y

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

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 programs that address that need. You may also pledge your gift to 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. How a particular donor chooses to make a gift varies. 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.

WHAT IS THE Y FOREVER CLUB?

The Y Forever Club is a special group of donors that have made a 1) pledged a planned gift to the Y for any purpose or (programs, capital, financial aid and etc.) 2) made a direct gift to the Y's Endowment Fund. Y Forever Club members, will enjoy the fellowship of new and longtime friends that find inspiration in the YMCA's work. Donors pledging gifts of \$10,000 and above will be recognized as lifetime members of the Y Forever Club. Additional donors will be recognized as friends of the Y Forever Club. Planned giving opportunities to qualify for the Y Forever Club include:

OUTRIGHT GIFTS

Immediate gifts of cash, appreciated securities, real or tangible property are welcome additions to the Y's Endowment. Donors 73 and above with IRA's may designate all or a portion of their annual Required and Mandatory Distribution (RMD) up to \$100,000 to contribute to the Y. Donors aged 73 and above may designate a portion of their annual Required Mandatory Distribution (RMD) to contribute to the Y. Donors aged 70.5-72 may optionally make a Qualified Charitable Distribution (QCD).

WILLS AND TRUSTS

A family can bequeath to the YMCA specific personal property or real estate, a specific sum of money or a percentage of estate assets. Donors may restrict their gifts for a specific purpose (Endowment, Programs, Capital, Financial Aid, and etc.)

RETIREMENT FUNDS

Leaving retirement funds to a charitable organization results in up to 90% overall tax savings for some taxpayers. Individuals may name the YMCA as a beneficiary for all or any portion of funds remaining at death.

LIFE INSURANCE

When an insurance policy is no longer essential, transferring the policy's ownership to the Y can result in tax benefits and a generous gift to the Y. The Y can also be included as a beneficiary, contingency beneficiary or owner of a new or existing policy.

BANK ACCOUNTS

Donors may add the Y as a beneficiary of their checking or savings bank accounts.

CHARITABLE REMAINDER TRUSTS

A Charitable Remainder Trust (CRT) is an irrevocable trust that allows donors to donate assets to a charity while receiving income for themselves or beneficiaries, with the remaining assets going to the charity upon the trust's termination, providing tax benefits.



FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY