



# IMAGINE. INSPIRE. INVEST.

## Simi Valley Family YMCA Capital Expansion Project

### Capital Expansion Project Ways to Contribute

#### **Cash**

Direct gifts - cash, check or via credit card provide immediate ways to give to the capital project.

#### **Recurring/Monthly Gifts**

Recurring/monthly giving allows a donor to elect to make a monthly ongoing donation for the capital project. Gifts will be accepted for the capital project through June 2030. Donors may discontinue the recurring gift at the time of their choosing.

#### **Securities and Wires**

Gifts of appreciated securities are tax deductible at their full market value. In most cases, appreciation in the value of the security benefits the YMCA and is not taxable to the donor. This can be a very tax beneficial way for donors to contribute for maximum impact.

YMCA Broker: Edward Jones (YMCA contact: Hugh Fisher)

DTC Participant #: 0057

Account: 19702302-13

Account Name: Southeast Ventura County YMCA

Tax ID #: 95-2305501

#### **Employer Matching Gifts**

Many corporations match employee gifts as part of their philanthropic efforts. If your company is eligible, request a matching gift form from your employer, and send it completed and signed with your gift. The YMCA will do the rest. The impact of your gift for the Simi Valley Y Capital Project may be doubled or possibly tripled. Some companies match gifts made by retirees and/or spouses.

#### **Donor Advised Funds and Charitable Gift Accounts**

Donors with Donor Advised Funds with a Community Foundation such as the Ventura County Community Foundation or Charitable Gift Accounts at Financial Institution may make their charitable contributions to the Simi Valley Family YMCA through these vehicles. Contact your fund administrator to discuss how you would like to make a gift through your DAF or CGA to the Simi Valley Family YMCA through an annual commitment or reoccurring gift going forward.

#### **Traditional IRA Annual Required Minimum Distributions "RMD" and Early IRA Distributions for Charitable Giving Purposes**

Individuals with IRA's that are 73 years and older are required to take an annual minimum distribution "RMD". Individuals at 70.5 have the option to do so. These distributions are taxable, unless donated directly to a charity. Consider gifting part of your RMD through a Qualified Charitable Deduction "QCD" to the Simi Valley Family YMCA by discussing with your fund administrator. The funds must be directly transferred by your fund administrator to the charities of your choice.

Individuals at age 59.5 and younger than 70.5 may take annual distributions from their IRAs and give to charity but the distribution will be counted as taxable income. These gifts may be tax deductible for individuals that itemize their deductions on their income tax. Donors are encouraged to speak with their accountants and investment advisors to determine the giving method best for them.

**Contact for More Information**

Connie Maguire, CFRE, Executive Vice President of Philanthropy  
Simi Valley Family YMCA/Southeast Ventura County YMCA  
31105 Thousand Oaks Blvd. Westlake Village, CA. 91362  
310.663.3079 or [cmaguire@sevymca.org](mailto:cmaguire@sevymca.org)  
[www.sevymca.org/simi-valley-family-ymca-capital-campaign](http://www.sevymca.org/simi-valley-family-ymca-capital-campaign)

