

NORTH PENN YMCA

Heritage Club
608 East Main Street
Lansdale, PA 19446

Notification of Membership

I qualify for membership in the **Heritage Club** by providing for the North Penn YMCA

- Lansdale Branch
- Indian Valley Branch
- Harleysville Branch
- LaCrest Health Center

_____ in my will
_____ another form of planned
giving, namely:

Request for Information:

I would like additional information about becoming a member of the Heritage Club.

Name: _____

Address: _____

City: _____

State: _____ Zip _____

Telephone:(Day) _____

(Evening) _____



The Heritage Club

The Heritage Club consists of a group of individuals who have provided for the future of the YMCA through their wills or other forms of planned gifts to the YMCA Endowment Fund. This brochure explains how you can become a member of this distinguished group. If you have already made a provision for the future, please let us know.

Heritage Club Opportunities

Through Your Will

Among the most popular ways to plan a long range gift is through your will. If you have not created a will, you should do so soon. If you do not clearly state in a document how you want your estate to be settled (your home, personal property, for example) the government will make this decision for you and your wishes may not be honored.

If you have a will, make sure it is up to date and that it reflects the changes in your lifetime and your interest in providing for the North Penn YMCA.

Whether you are drafting your will for the first time or changing an established one, consider including the North Penn YMCA as one of your beneficiaries. Many friends have used their wills to make gifts to benefit the work of the North Penn YMCA. Either way, your bequest would be appreciated and most welcomed.

Through Other Planned Gifts

In addition to a bequest, you can make a “future” gift to the North Penn YMCA in ways appropriate to your particular situation. Here are just two possibilities:

Life Insurance

You can transfer an existing policy to the North Penn YMCA as owner and beneficiary and receive a tax deduction for the policy’s “replacement value” (essentially the cash surrender value) or you can purchase a new policy to benefit the North Penn YMCA. While there will be no cash surrender to deduct with a new policy, premiums that you would pay are deductible.

Charitable Trusts

You can create a charitable trust by transferring cash, securities or other property to a trustee (such as a bank) in return for lifetime income to you (and a second beneficiary, if appropriate) before the YMCA benefits. In addition to income for life, an immediate tax deduction will be generated and no capital gains tax will be due if appreciated property creates the gift. Finally, the gift will be removed from your estate, possibly resulting in estate tax savings.

Joining The Heritage Club

We hope that you will consider joining the Heritage Club. Please use the attached card to notify the YMCA of its inclusion in your will or another arrangement, or to tell us that you would like additional information. If you prefer, you can call Robert M. Gallagher at 215-368-1601, ext. 201 for information on how your donation will help the YMCA continue to fulfill its mission. We hope that you decide to be part of a lasting presence at the North Penn YMCA.

Heritage Club Benefits

Without question, the most important benefit that you will receive from your club commitment is the satisfaction that you are participating in the future of an organization that is serving the North Penn, Indian Valley and Perkiomen Valley communities so capably.

You will receive other benefits, such as recognition in our annual honor roll of donors, publications and announcements, as well as invitations to special events.

Endowment Committee

An Endowment Committee of the Board of Directors establishes policies governing the planned giving program and promotes membership in the Heritage Club.

Financial information about the YMCA can be obtained by calling 215-368-1601, ext. 204 to request a copy of our Annual Report.

Heritage Club

Mr.* & Mrs. Eric Arneth
Herman Bishop*
Dr. & Mrs. John Brent
Mr. & Mrs. Gary E. Brown
John Courtney*
J. Howard Deming
H. Richard Eyer
Mr. & Mrs. Robert M. Gallagher
Leah R. Gileson*
Mr. & Mrs. Cortland P. Hill
Senator Edwin G. Holl *
Norman H. Jack, Jr.*
Mr. & Mrs. Phillip Jones
Lucille M. Landers*
Mr. E. David MacNally
David C. Onorato, Esq.
Andora J. Quinby
Georgine Rettstadt
Mr. & Mrs. Alfred Rotelle
Daniel H. Schultz*
Mr. & Mrs. Clayton R. Smith
Larry Wenhold
Mr. & Mrs. Len Wilson

*Deceased

Board of Trustees

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**North Penn
YMCA**

**Heritage
Club**

Mission of the North Penn YMCA

“Our mission is to make the community we serve a better place to live. Through our programs and activities, we strive to enrich and strengthen the families; provide wholesome, supervised recreation; offer positive learning, leadership and character development opportunities; and promote wellness for all people regardless of ability to pay.”