



## Letter of Intent For a Legacy Gift

### GIFT

To support the mission of the YMCA of Greenwich, I/we have made a provision for a gift as a part of my/our estate plans through a:

- |                                             |                                                  |
|---------------------------------------------|--------------------------------------------------|
| <input type="checkbox"/> Will or Trust      | <input type="checkbox"/> Beneficiary Designation |
| <input type="checkbox"/> Retirement Account | <input type="checkbox"/> Life Insurance Policy   |
| <input type="checkbox"/> Charitable Trust   | <input type="checkbox"/> Other _____             |

### PREFERENCE

My/our gift is a specific dollar or percentage (optional): \$ % \_\_\_\_\_

I/we would like for our gift to be:

- ☐ Unrestricted – for maximum flexibility to meet future needs.
- ☐ Restricted – please share your intentions so that we can ensure your gift has maximum impact, and consult your attorney so that your gift instructions can be recorded legally and accurately. \_\_\_\_\_

Acknowledgement preference:

- ☐ Yes, you may list my/our name(s) in connection with this gift.
- ☐ No, please do not publicly list my/our name(s).

### MY INFORMATION

\_\_\_\_\_  
Name(s)

\_\_\_\_\_  
Address, City, State, Zip

\_\_\_\_\_  
Phone #

\_\_\_\_\_  
E-mail

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature(s)

Personal Representative /  
Executor / or Fund Company:

Contact (Address, Phone, E-mail):



**Share Your Y  
For a Legacy Gift**

## **Every legacy has a story.**

Thank you for including the YMCA of Greenwich in your estate plans. Your thoughtful generosity will help strengthen our community for generations to come.

We'd be honored if you shared why you chose to remember the Y. Your story may inspire others to create a lasting impact for the children, families, and neighbors who will rely on the YMCA in the years ahead.