



ADDING THE YMCA TO YOUR WILL

A bequest—a gift in your will—is simple and convenient. A bequest is the easiest way for you to make a legacy gift to the YMCA.

You can use the following language to add the YMCA as a beneficiary in your will.

Your bequest can be a specific dollar amount or a percentage of your estate. You can designate your bequest for general use, or you can restrict its use for a particular center. Many individuals establish endowments in memory of a family member or another loved one. These endowments live forever, since only the portion of the fund available for spending each year is paid out annually.

We recommend that you consult with your attorney or financial advisor as you complete this process.

TYPES OF BEQUESTS

Specific bequests allow you to make a gift of a specific dollar amount or specific asset (such as securities, real estate, or personal property).

Residuary bequests enable you to give all or a portion of the remainder of your estate after payment of expenses and any specific amounts designated to other beneficiaries.

INCLUDING THE YMCA OF GREATER INDIANAPOLIS IN YOUR WILL

You will find below several examples of suggested bequest wording to benefit the YMCA. Because YMCA endowment funds are controlled by a separate nonprofit, bequests should be directed to the YMCA Foundation of Greater Indianapolis.

Each individual situation is unique; therefore, these examples include only some of the possible gift opportunities. We encourage you to discuss your intentions with representatives of the YMCA of Greater Indianapolis to ensure that your wishes are properly followed and your gift properly recognized.

Because a will is an important legal document, please seek an attorney's help. To assist you with this important process we offer suggested wording below.

DESIGNATING THE PURPOSE OF A BEQUEST

Unrestricted: The most useful type of bequest is unrestricted, allowing the funds to be allocated wherever the need is greatest, and taking into account that changes (new programs, new centers) may necessitate a use that cannot be anticipated at the time of the gift.

Restricted: You may designate your bequest to support a specific center with which you are associated.

UNRESTRICTED

Percentage of estate for unrestricted purposes

"I give to the YMCA Foundation of Greater Indianapolis, a not-for-profit organization located in Indianapolis, IN _____ percent (%) of the remainder of my estate for its general charitable purposes."

Specific amount for unrestricted purposes

"I give to the YMCA Foundation of Greater Indianapolis, a not-for-profit organization located in Indianapolis, IN, the sum of \$_____ in cash (or _____ shares of _____ stock) to be used for its general charitable purposes."

RESTRICTED**Percentage of estate for a specific center**

"I give to the YMCA Foundation of Greater Indianapolis, a not-for-profit organization located in Indianapolis, IN, _____ percent (%) of the remainder of my estate to benefit the _____ Center. The portion of this fund available for spending each year shall be used in support of programmatic and capital needs at the _____ Center. Additional contributions may be added to this amount at any time."

Specific amount for a specific center

"I give to the YMCA Foundation of Greater Indianapolis, a not-for-profit organization located in Indianapolis, IN, the sum of \$_____ in cash or in-kind (or _____ shares of _____ stock) to be used in support of programmatic and capital needs at the _____ Center. Additional contributions may be added to this amount at any time."

If the bequest is restricted to a specific center, it is important that you add the following wording in your provision. This will ensure that, in the remote possibility a specified center may cease to need funds in the future, an alternate use or the bequest may be determined.

"If changed circumstances should at some future time make it impractical to continue administering the gift for the purpose designated, then the YMCA of Greater Indianapolis Board of Directors may re-designate the purpose, provided the terms adhere as closely as possible to my original intent."