

### Forest City Family YMCA Endowment Fund

The Forest City Y endowment fund provides a stable foundation upon which the YMCA continues to build its future. Gifts to the fund are invested, allowing the Y to use the earned interest to support critical programs. Gifts can be made to the fund at any time. Donors may specify how they would like their gifts to be used. The fund and its professional managers are supervised by the Y's Board of Directors.

John K. and Luise V. Hanson established the Forest City Family YMCA Endowment Fund in 1987 to maintain affordable rates and to ensure the longevity of the Y. Interest from this unrestricted fund supports critically important operating costs. Gifts can be added to this fund, or a named fund can be established.

The Oleson Family Scholarship Fund is an example of a named fund in memory of Merrill G. Oleson, former executive of the Forest City Y. The interest generated from this fund supports a specific interest of the family. It is the family's wishes that others consider a gift to grow this fund.



**PICTURED ABOVE: FOUNDING MEMBERS OF THE FOREST CITY FAMILY YMCA HERITAGE CLUB**  
Left to right: Gerald Boman, Mary Jo Boman (daughter of John K. and Luise V. Hanson), Bruce Mielke (Forest City Y Executive), Paula Richardson (daughter of Merrill and Beth Oleson), Beth Oleson

# JOIN US

**For further information, and/or to indicate that you qualify for Forest City Family YMCA Heritage Club membership, please complete and return this form. All information is held in strict confidence.**

- I/We have made provisions for the Forest City YMCA in our estate plans but have not yet notified you.
- I/We would like to receive a free copy of "*A Planning For Tomorrow: A Guide for Planning Giving.*"
- I/We would like to visit with a member of the YMCA Board or staff concerning my interest.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone: (\_\_\_\_) \_\_\_\_\_

Email: \_\_\_\_\_

Signature: \_\_\_\_\_

**Please return this form or call for additional information:**

**Forest City Family YMCA**  
916 West I Street  
Forest City, Iowa 50436  
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F 641-585-5860  
info@forestcityymca.org  
www.forestcityymca.org



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# TODAY'S COMMITMENT TOMORROW'S REWARD

**FOREST CITY FAMILY YMCA  
Heritage Club**

# A LIVING LEGACY

**One of our greatest aspirations in life is to leave a mark—to make a difference. Since its founding by generous visionaries, the Forest City Y has been a faithful friend to children and families in our community. It is now up to us to ensure our Y remains to support generations to come. Through your commitment, you can help ensure that our Y continues to serve as a center for personal, family and community development. We invite you to become a member of the Forest City Family YMCA Heritage Club.**

## **Forest City YMCA Heritage Club**

To ensure the Y remains in the Forest City community for generations to come, the Board of Directors established the Forest City Family YMCA Heritage Club in 2012. The members of this club are as diverse as our great community. All members, however, share a common belief in the need to build a stronger future through the work of the YMCA. They are a group of individuals whose vision for the YMCA and the health of our community extends beyond their own lifetimes. They are charitable-minded visionaries who are investing in the Forest City Y's future through outright and planned gifts to the Forest City Family YMCA Endowment Fund.

## **Make Your Wishes Known**

If you've put off creating or updating your will, take the time now to make your wishes known. The benefits of planned giving are numerous—for you and people and organizations you care about. With thoughtful planning, you can ensure that your estate has the greatest impact on your family and the charitable causes you support.

Becoming a Heritage Club member does not mean you have to give a gift with today's dollars. Most Heritage Club members qualify by planned giving in the form of wills, charitable trusts, life insurance or by other means which can provide substantial tax savings and other benefits to a donor.

## **Many Ways to Give**

**Testamentary Gifts** are gifts to the YMCA Endowment Fund made through your will, revocable living trust or life insurance benefits. These gifts include cash, specified securities, real property or a portion of your estate's assets such as an IRA. Your estate will not pay estate tax on these gifts.

Gifts of **Life Insurance** are made by transferring ownership of a life insurance policy to the YMCA during your lifetime. There may be an income-tax deduction available for this gift.

A **Charitable Remainder Trust** gift allows you to transfer property to a remainder trust for the YMCA with income from the trust going to you or a beneficiary during her or his lifetime or for a specified term of years. You will receive a charitable tax deduction for making the gift during your lifetime. If the Charitable Remainder Trust gift is made in your estate, there can be estate tax savings.

**Outright Gifts** of cash, stock or other securities can be made to the YMCA Endowment Fund. Many donors find that a contribution of appreciated stock or securities can provide income tax savings since their value for tax purposes may be set at their present value—not their cost basis.

**In Honor Of...Memorial and Tribute Gifts** in the form of a named endowment gift can provide a fitting and lasting tribute to someone special in your life. A memorial gift will honor the memory of someone while carrying forward that individual's ethic of community service. A tribute gift honors special in your life today, allowing them to share in the joy of good work