

Spirit Society Intention Form

In support of YMCA of the Rockies, I confirm that I have established a bequest or other deferred gift provision for the benefit of YMCA of the Rockies. I understand that information disclosed on this form will be held in confidence and that my gift provision remains completely revocable and at my discretion. For legal and tax purposes, the YMCA tax ID# is 84-0404-913 and our legal name is **YMCA of the Rockies**.

Name(s): _____

Address: _____

Phone Number(s): _____

Email Address(s): _____

I/we have included the YMCA of the Rockies as a beneficiary of my/our:

- | | |
|---|--|
| <input type="checkbox"/> Will or Revocable Living Trust | <input type="checkbox"/> IRA or Other Retirement Account |
| <input type="checkbox"/> Charitable Trust | <input type="checkbox"/> Life Insurance Policy |
| <input type="checkbox"/> Charitable Gift Annuity | <input type="checkbox"/> Marketable Securities |
| <input type="checkbox"/> Real Estate Gift | |
| <input type="checkbox"/> Other (please specify) _____ | |

Current estimated value of provision: \$_____ (Optional)

Contact information for financial institution or individual facilitating your gift:

Name(s): _____

Phone Number & Email: _____

Estate gifts are placed in the YMCA of the Rockies general endowment fund, unless otherwise designated.

- ☐ YMCA of the Rockies General Endowment
- ☐ Other _____ (a YMCA staff member will reach out to you)

Please include my/our name in Spirit Society listings as follows:

Name(s): _____

☐ I would like my name to be anonymous in publications regarding the Spirit Society

This form is my statement of revocable bequest intention.

Signature

Date

Signature

Date

You may print this form & send it to gbergen@ymcarockies.org, 2515 Tunnel Rd, Estes Park, CO 80511.

YMCA of the ROCKIES
2515 Tunnel Road, Estes Park, CO 80511
P 970-586-4444 F 970-586-6088
Philanthropy Office 970-586-8121
YMCAROCKIES.ORG

ESTES PARK CENTER SNOW MOUNTAIN RANCH CAMP CHIEF OURAY