

Bequest Intention Form



Thank you for your generous bequest to the YMCA of Greater Cleveland.

Please use this form to share details about your future gift. We understand that your gift is revocable and that you may change plans at any time.

Name (Print) _____ Date _____

Address _____

City _____ State _____ Zip _____

Email _____ Phone _____

1. I have included the YMCA of Greater Cleveland as a beneficiary of my:

☐ Will/Living Trust ☐ Retirement Plan ☐ Savings Account ☐ Life Insurance Policy ☐ Other

2. ☐ My bequest is in the specific amount of: \$ _____

OR

☐ My bequest is a percentage worth approximately: \$ _____

(Please provide your best estimate of the value of your future gift, based on the approximate current value of your assets.)

☐ I wish to keep the value of my bequest private.

3. ☐ My gift is contingent on the prior death of a spouse or partner.

4. ☐ Please reach out to me personally to discuss my support of the YMCA of Greater Cleveland.

The best way to reach me is _____

5. I would like to designate my estate gift to a specific YMCA of Greater Cleveland Branch: _____

Recognition

☐ I would like to be recognized as:

(Most listings are First and Last Name(s). For example Jane Smith or Jane and Michael Smith.)

☐ I want to keep my name anonymous. Please list me as **Planned Gift Supporter**.

Please return to:

Megan DeFranco
YMCA of Greater Cleveland
1501 Euclid Ave., Suite 800
Cleveland, OH 44115

For questions or more information:

clevelandymca.org/create-your-legacy
216-263-6296 or
mdefranco@clevelandymca.org