



### CONFIDENTIAL ENROLLMENT FORM

In consideration of the impact that Boys & Girls Clubs of Schenectady has on the lives of young people and adults, I/we have made provision for a gift to the Club in my/our estate plan. Understanding that the Club Trustees have established The Heritage Club to recognize individuals who made such a commitment, I/we are pleased to authorize the Club to include me/us as a member of The Heritage Club.

#### Please print or type

Title \_\_\_\_\_ Name \_\_\_\_\_ Name of Spouse \_\_\_\_\_

Date of birth \_\_\_\_\_ Spouse Date of birth \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Name (s) for recognition purposes \_\_\_\_\_

Daytime Phone \_\_\_\_\_ Evening Phone \_\_\_\_\_

(Please include area code with telephone numbers)

E-Mail Address \_\_\_\_\_

#### Relationships with Boys & Girls Clubs

- |   |   |                                      |
|---|---|--------------------------------------|
| <input type="checkbox"/> Board of Directors (current or past) | <input type="checkbox"/> Parent/Grandparent | <input type="checkbox"/> Volunteer   |
| <input type="checkbox"/> Alumnus                              | <input type="checkbox"/> Friend             | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Staff                                |   |                                      |

#### Gift Information

I/we qualify for The Heritage Club through the following planned gift:

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> Bequest (or Living Trust) <ul style="list-style-type: none"><li><input type="checkbox"/> Dollar amount</li><li><input type="checkbox"/> Stock or property</li><li><input type="checkbox"/> Percentage bequest</li><li><input type="checkbox"/> Residuary bequest</li></ul> | <input type="checkbox"/> Charitable Gift Annuity <ul style="list-style-type: none"><li><input type="checkbox"/> Charitable Remainder Annuity Trust</li><li><input type="checkbox"/> Charitable Remainder Unitrust</li><li><input type="checkbox"/> Deferred Charitable Gift Annuity</li></ul> | <input type="checkbox"/> IRA/Retirement Plan Beneficiary <ul style="list-style-type: none"><li><input type="checkbox"/> Gift of Residence or Farm with Retained Life Estate</li><li><input type="checkbox"/> Charitable Lead Trust</li><li><input type="checkbox"/> Life Insurance Policy</li></ul> |
|---|---|---|

Please indicate the approximate current market value of the planned gift named above:

\$ \_\_\_\_\_ (Optional - Will be treated as confidential.)

The gift is:

- ☐ Unrestricted      Restricted as follows: \_\_\_\_\_
- ☐ I/ we wish to remain an anonymous member of The Heritage Club.

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

For office use: Reported by: \_\_\_\_\_ Date: \_\_\_\_\_

Title/Position \_\_\_\_\_

Please mail completed form to: Boys & Girls Clubs of Schenectady, Attn: Lauren de Jong, Director of Development  
400 Craig Street Schenectady, New York 12307 or call (518) 374-4714 ext. 32 to arrange a home visit to discuss your questions.