



Boys & Girls Clubs of Mercer County Legacy Society CONFIDENTIAL ENROLLMENT FORM

In consideration of the impact that Boys & Girls Clubs of Mercer County has on the lives of young people, I/we have made provision for a gift to the Club in my/our estate plan. Understanding that the Club Trustees have established The Legacy Society 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 Legacy Society.

Please print or type

Title _____ Name _____

Address _____

City _____ State _____ Zip Code _____

Name for recognition purposes _____

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"/> Foundation member |
| | <input type="checkbox"/> Staff | <input type="checkbox"/> Other _____ |

Gift Information

I/we qualify for The Legacy Society through the following planned gift:

- | | | |
|--|---|--|
| <input type="checkbox"/> Bequest (or Living Trust) | <input type="checkbox"/> To be determined | <input type="checkbox"/> IRA/Retirement Plan Beneficiary |
| <input type="checkbox"/> Dollar amount | <input type="checkbox"/> Charitable Remainder Annuity Trust | <input type="checkbox"/> Gift of Residence or Farm with Retained Life Estate |
| <input type="checkbox"/> Stock or property | <input type="checkbox"/> Charitable Remainder Unitrust | <input type="checkbox"/> Charitable Lead Trust |
| <input type="checkbox"/> Percentage bequest | <input type="checkbox"/> Deferred Charitable Gift Annuity | <input type="checkbox"/> Life Insurance Policy |
| <input type="checkbox"/> Residuary bequest | | |
| <input type="checkbox"/> Charitable Gift Annuity | | |

Optional: Please indicate the approximate current market value of the planned gift named above:
\$ _____ (Will be treated as confidential.)

The gift is:

- Unrestricted Restricted as follows: _____

Gift Recognition:

- I/we wish to be listed as Legacy Society members in Club materials.
- I/we wish to write a story/provide pictures regarding our legacy gift. Please follow up with us.
- I/ we wish to remain an anonymous member of The Legacy Society.

Signature: _____ Date: _____

Email completed form to David Anderson at danderson@bgcmercer.org