



FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

LEAVING A LEGACY FOR FUTURE GENERATIONS

SIDNEY-SHELBY COUNTY YMCA
HERITAGE CLUB



SIDNEY-SHELBY COUNTY YMCA
300 E. Parkwood St.
Sidney, OH 45365
Phone: 937.492.9134
FAX: 937.492.4705
www.sidney-ymca.org
[facebook.com/sidneyymca](https://www.facebook.com/sidneyymca)





Dear Y Members and Friends,



One philanthropic gift creates a tremendous ripple effect...from ourselves to our families and on to the world around us - usually reaching so far we may not even realize the life changing impact our gift has created in the lives of others.

At the YMCA, strengthening community is our cause. You can make a lasting impact on how your YMCA strengthens the Shelby County Community as we have for 50 years by "joining" the Heritage Club and making a commitment to contribute a meaningful gift to the YMCA Foundation either now or through a future gift.

By doing so, your gift will allow the Y to continue to serve and make a lasting difference for the next 50 years and beyond! Each gift is invested and only the earnings of those investments are used to fund YMCA programs and special projects each year. You are truly contributing to a future of new possibilities for families and children throughout our growing community.

I thank you for considering a gift to the Sidney-Shelby County YMCA Foundation, and for your ongoing support!

In service,

Ed Thomas, CEO



What is the Heritage Club?

The members of this "club" are made up of a group of charitably minded individuals who have made a gift to the YMCA Foundation or have named the YMCA in their estate plans. They are friends of the YMCA who believe in the YMCA mission and are committed to keeping the YMCA viable and affordable well into the future.

They are supporters who believe the YMCA makes a meaningful difference in the lives of all individuals, are strengthening our Shelby County community, and want to demonstrate their support by making a significant commitment.

Additionally, as a member of the Heritage Club Program, you have the option of selecting a variety of financial plans which may benefit your family's needs for years to come. Many avenues are available to blend your philanthropic goals with your own financial, tax and estate plans. With thoughtful planning you can ensure your estate has the greatest impact on your family and the charitable causes you support.





Your Lasting Impact

When you give to the Y, you make Shelby County stronger. As a leading nonprofit for youth development, healthy living and social responsibility, the Y uses your gift to nurture children and teens, improve community health and well-being, and support those in need, right in your own neighborhood. Some of these opportunities include: Teen Leader Programs, Special Needs Cheer Team, Membership and Program Financial Assistance, Diabetes Prevention and Parkinsons Programs.

The Y has been a great place for my family – especially for my daughter Justine, who has Spina Bifida. Due to her condition, she has to use a wheelchair. She never thought she would ever be able to be a cheerleader.

Thanks to the commitment of the Y and some very special coaches who decided to open a special needs cheer team, they made it possible for Justine to become a cheerleader. The best part is seeing the relationships grow between the teammates and also between the parents. Going to the competitions with all the other cheer teams is so exciting for the kids.

The Y and coaching staff have done a wonderful job teaching the team and making them feel just as important as all the other cheer teams. Having this at the Y for my daughter has been such a blessing and I am so grateful to be a part of the Y family. – Tracy P.



Your Giving Options

Your gift to the Y's Foundation could be as simple as an outright gift of cash, or a future gift that you specify in your estate plans so you may ensure that your family's future financial needs are met as well. The chart below offers you an overview of some of the options for you to consider. We encourage you to work with a trusted advisor, attorney or tax and accounting professional to maximize all of your benefits.

Gift Type	How It Works	Benefit
Life Insurance	Name the Y owner and beneficiary	Significant gift from income instead of capital
Retirement Plan Assets	Name the Y beneficiary of an IRA	No double taxation, Y receives balance of the plan
Securities	Transfer stocks, bonds or mutual funds to the Y	Immediate deduction, no capital gains tax
Real Estate	Deed your home to the Y who may sell it and use the proceeds	Immediate deduction, no capital gains tax
Retained Life Estate	Gift your home to the Y, and continue to live in it	Estate tax savings, plus income tax deduction
Charitable Remainder Annuity Trust	Create a trust which pays you fixed income for life. At death, remaining balance is transferred to the Y.	Immediate deduction, fixed and certain income, avoid capital gains tax.
Charitable Lead Trust	Contribute to a trust which makes annual payments to the Y. At death the remaining balance is paid to your heirs.	Reduce the tax cost of transferring an asset to your heirs.

Note: this is a small example of your giving options. The information included in this booklet is not intended as legal or tax advice. Please consult an attorney or financial advisor.



For more information, please contact:
Sidney-Shelby County YMCA
300 E. Parkwood St.
Sidney, OH 45365
937.492.9134

Ed Thomas, CEO
ethomas@sidney-ymca.org

Mark Kaufman, Financial Development Director
mkaufman@sidney-ymca.org

Mission

To put Christian principles into practice to benefit all Shelby County residents through programs that build healthy spirit, mind and body for all.

Vision

The Sidney-Shelby County YMCA will be the hub of community activity and the recognized leader in lifelong health and wellness where children are nurtured through character development, teens are empowered, families grow stronger and older adults are engaged.