**YMCA of the Virginia Peninsulas**

**The Spencer Society**

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| Confidential Information |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Full Name** | |  | | | | | | |
| **Birth Date** | |  | | | | | | |
| **Spouse’s Name** | |  | | | | | | |
| **Birth Date** | |  | | | | | | |
| **Home Address** | |  | | | | | | |
| **City** |  | | **State** |  | **Zip** |  | **Phone** |  |
| **E-mail Address** | |  | | | | | | |
| The purpose for which gifts are to be used when they become available in future years for the Endowment Fund: | | | | | | | | |
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| A. General purposes of the YMCA throughout the service area of the YMCA of the Virginia Peninsulas. | | | | | | | | |
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| B. Specific purposes of the YMCA as follows: | | | | | | | | |
| For Center      ; For Program | | | | | | | | |
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| Method(s) used to qualify for membership in the Spencer Society: | | | | | | | | |
|  | | | | | | | | |
| A. Will/Revocable Trust:       % for the YMCA; $      to the YMCA | | | | | | | | |
| Primary Beneficiary  Contingent Beneficiary | | | | | | | | |
| B. Outright Gift of  Cash  Stock  Property; $ Approx. Value | | | | | | | | |
| C. Life Insurance: $ | | | | | | | | |
| Primary Beneficiary  Contingent Beneficiary | | | | | | | | |
| D. Pooled Life Income Fund | | | | | | | | |
| E. Short-term Trust | | | | | | | | |
| F. Charitable Gift Annuity | | | | | | | | |
| G. Charitable Remainder Unitrust or Annuity Trust | | | | | | | | |
| H. Pension Plan (IRA, 401K) Remainder | | | | | | | | |
| I. Real Estate:  Home  Farm  Lot; $      Approx. Value | | | | | | | | |
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| ***Signature:***  ***Additional Information:*** | | | | | | | | |