



*Every day we write part of our story—a story that will become a legacy passed down to the next generation. If an important part of your life's story is making a gift that continues giving, then there is no better way to honor that vision than to create a lasting legacy of generosity that will shape the future of generations to come.*

### **What is the Heritage Club?**

The Heritage Club is a prestigious donor recognition society honoring those who have shared their intent to include Boys & Girls Clubs of Bay & Lakes Region (BGCBLR) in their estate plan. Your Planned Gift to BGCBLR demonstrates the spirit of compassion that is transformative in nature. By including us in your estate plans, you will make a profound and lasting impact on the future of our communities youth.

### **What are the benefits of membership in The Heritage Club?**

As a member, you'll receive a Heritage Club lapel pin as a token of our sincere appreciation, in honor of your legacy gift to Boys & Girls Clubs of the Bay & Lakes Region, have access to regular updates on our programs through the newsletter and be listed as a Heritage Club member on our website.

### **How do I become a member of The Heritage Club?**

A commitment to include Boys & Girls Clubs of the Bay & Lakes Region in your estate plans grants membership into The Heritage Club. Examples of planned gifts include, but are not limited to:

- Bequest (or Living Trust)
- Charitable Gift Annuity
- Charitable Remainder Annuity Trust
- Charitable Remainder Unitrust
- Deferred Charitable Gift Annuity
- IRA/Retirement Plan Beneficiary
- Gift of Residence or Farm with Retained Life
- Estate Charitable Lead Trust
- Life Insurance Policy

Joining The Heritage Club is easy. Simply communicate your intention by signing and returning the enrollment form (on back) to [amatelski@bayandlakes.org](mailto:amatelski@bayandlakes.org). For more information, you may request that a planned giving representative contact you to discuss your specific estate planning needs and opportunities.

In consideration of the impact that Boys & Girls Clubs of the Bay & Lakes Region (BGCBLR) has on the lives of young people and adults, I/we have made provision for a gift to BGCBLR in my/our estate plan. Understanding that BGCBLR has 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.

**Contact Information:**

Name: \_\_\_\_\_ Name of Spouse: \_\_\_\_\_  
Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_ Email: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_ Spouse Date of Birth: \_\_\_\_\_  
How would you like to be listed in Heritage Club? \_\_\_\_\_

**Relationships with Boys & Girls Clubs**

- Board of Directors (current or former)
- Alumnus (attended a Boys & Girls Club)
- Parent/Grandparent
- Friend
- Staff

**Gift Information:**

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

- Bequest (or Living Trust)
  - Dollar amount
  - Stock or property
  - Percentage bequest
  - Residuary bequest
- Charitable Gift Annuity
- Charitable Remainder Annuity Trust
- Charitable Remainder Unitrust
- Deferred Charitable Gift Annuity
- IRA/Retirement Plan Beneficiary
- Gift of Residence or Farm with Retained Life Estate
- Charitable Lead Trust
- Life Insurance Policy

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

**The gift is:**

- Unrestricted
- For the following region: Green Bay \_\_\_\_\_ Door County \_\_\_\_\_ Shawano \_\_\_\_\_

Your support through a planned gift will ensure that future generations of our children will have the opportunity to live successful lives in a safe, positive and caring environment.

Signature: \_\_\_\_\_ Today's Date: \_\_\_\_\_