



**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**

- Board of Directors (current or past)
- Parent/Grandparent
- Volunteer
- Alumnus
- Friend
- Other \_\_\_\_\_
- 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:**  
\$ \_\_\_\_\_ **(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: Tish Czachor, Director of Advancement  
PO Box 466 Schenectady, NY 12301 or call (518) 374-4714 to arrange a visit to discuss your questions.