



**BOYS & GIRLS CLUBS
OF DANE COUNTY**

HERITAGE CLUB PLEDGE FORM

In consideration of the impact that Boys & Girls Clubs of Dane County has on the lives of young people and adults, I/we have made 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.

Name(s) for recognition purposes: _____

PLANNED/ DEFERRED GIFT INFORMATION

I/We have previously selected the following type of gift: _____

If a gift has not yet been selected, I/we qualify for The Heritage Club through the following type of planned gift:

- | | | |
|---|--|---|
| <input type="checkbox"/> Bequest | <input type="checkbox"/> Charitable Gift Annuity | <input type="checkbox"/> Gift of Residence or Farm with Retained Life Estate |
| <input type="checkbox"/> Dollar Amount | <input type="checkbox"/> Charitable Remainder Annuity Trust | |
| <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"/> Residential Bequest | <input type="checkbox"/> IRA/Retirement Plan Beneficiary | |

Please indicate the approximate current market value of the planned gift named above:

\$ _____ (will be treated as confidential) Unknown

My/our provision names the **“Boys & Girls Clubs of Dane County”** as the beneficiary.

I/We wish our gift to be directed as follows:

Unrestricted

Restricted as follows _____

I/We wish to remain an anonymous member of The Heritage Club.

Signature: _____ Date: _____