

Legacy Society Boys & Girls Clubs of Monterey County Confidential Request for Information Form

An important source of funds for Boys & Girls Clubs of Monterey County (BGCMC) are from gifts made through will/bequests and estate plans. To this effect, the Club Board of Directors has established the Legacy Society to recognize individuals who make such a commitment. We would be so grateful if you could fill out the form below as to your level of interest or if you are confirming you have included us in your Will.

Please print or type

Title _____ Name _____ Spouse's Name _____

Address _____

City _____ State _____ Zip Code _____

After you have provided for your family, might you consider leaving a gift to BGCMC:

- Yes, I/we already have included BGCMC in my/our plans
- I/we intend to include BGCMC when I/we make or revise my/our will
- I/we would consider this type of gift and would like more information
- I/we have a will and have mentioned other charities, but not included BGCMC
- I/we have a will, but not included a charity
- I/we do not have a will
- It's not something I'm interested in at this time

Relationships with Boys & Girls Clubs

- Board of Directors (current or past)
- Parent/Grandparent
- Volunteer
- Friend
- Staff
- Alumnus
- Other _____

Gift Information

I/we are interested in or confirm the following planned gift:

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

Perhaps you could also let us know:

- I/we are interested in making a small monthly gift, please send me more details
- I/we would like a tour of the Clubhouse, to see the new programs and talk to the kids we support
- I/we are interested in volunteering at the Clubs, please tell us more

Many thanks! Please mail to: Miranda Jackson, Boys & Girls Clubs of Monterey County, P.O. Box 97, Seaside, CA 93955 or scan and email to: development@bgcmc.org

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