



## CONFIDENTIAL ENROLLMENT FORM



In consideration of the impact that Boys & Girls Clubs of Sonoma Valley has on the lives of young people and adults, I/we have made provision for a gift to Boys & Girls Clubs of Sonoma Valley in my/our estate plan. Understanding that the Boys & Girls Clubs of Sonoma Valley Trustees have established The Heritage Club to recognize individuals who made such a commitment, I/we are pleased to authorize Boys & Girls Clubs of Sonoma Valley to include me/us as a member of The Heritage Club.

Please print or type

☐ I/we wish to remain an anonymous

Name(s) as you would wish to appear for recognition purposes

Mailing address

City/State /ZIP Code

Daytime Telephone

Evening Telephone

E-Mail Address

(Please include area code with telephone numbers)

### Relationships with Boys & Girls Clubs

- |   |   |                                      |
|---|---|--------------------------------------|
| <input type="checkbox"/> Board of Directors (current or past) | <input type="checkbox"/> Parent/Grandparent | <input type="checkbox"/> Volunteer   |
| <input type="checkbox"/> Alumnus                              | <input type="checkbox"/> Friend             | <input type="checkbox"/> Other _____ |
|   | <input type="checkbox"/> Staff              |                                      |

### Gift Information

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

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Bequest (or Living Trust)                                       | <input type="checkbox"/> Charitable Remainder  | <input type="checkbox"/> Pooled Income Fund        |
| <input type="checkbox"/> Dollar amount   | <input type="checkbox"/> Annuity Trust         | <input type="checkbox"/> Gift of Residence or Farm |
| <input type="checkbox"/> Stock or property   | <input type="checkbox"/> Charitable Remainder  | <input type="checkbox"/> with Retained Life Estate |
| <input type="checkbox"/> Percentage bequest  | <input type="checkbox"/> Unitrust              | <input type="checkbox"/> Charitable Lead Trust     |
| <input type="checkbox"/> Residuary bequest   | <input type="checkbox"/> IRA / Retirement Plan | <input type="checkbox"/> Life Insurance Policy     |
| <input type="checkbox"/> Charitable Gift Annuity   | <input type="checkbox"/> Beneficiary           |  |
| <input type="checkbox"/> Unsure, I wish to learn more about the options available to me. |  |  |

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: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_