



# 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

- 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)
- Charitable Remainder Annuity Trust
- Pooled Income Fund
- Dollar amount
- Charitable Remainder Unitrust
- Gift of Residence or Farm with Retained Life Estate
- Stock or property
- IRA / Retirement Plan Beneficiary
- Charitable Lead Trust
- Percentage bequest
- Life Insurance Policy
- Residuary bequest
- Charitable Gift Annuity
- 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: \_\_\_\_\_