



CONFIDENTIAL ENROLLMENT FORM

In consideration of the impact that the Boys & Girls Club of West San Gabriel Valley 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 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

Name _____ Name of Spouse _____

Address _____

City _____ State _____ Zip Code _____

Name(s) for recognition purposes _____

Daytime Telephone _____ Evening Telephone _____

E-Mail Address _____ Date of Birth _____

(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)
 - Dollar amount
 - Stock or property
 - Percentage bequest
 - Residuary bequest
- Charitable Remainder Annuity Trust
- Charitable Remainder Unitrust
- IRA / Retirement Plan Beneficiary
- Pooled Income Fund
- 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: _____

Reported by: _____ Date: _____

Title/Position _____