

YMCA-YWCA HERITAGE CLUB MISSION:

To assure a stable, long-term financial base for the Marshalltown Y so that the missions of both the YMCA and the YWCA can be secured. The benefits of becoming a member include establishing a working legacy to positively influence future generations.

About Heritage Club

The Heritage Club was started in 1982 by some visionary Y volunteers and staff who knew that with the Y's mission work being the highest priority in annual operating budgets, it would be important to set aside endowment funds for facility and capital maintenance.

The Endowment Fund is needed to sustain the physical property and programming of the entire YMCA-YWCA campus as it presently exists, as well as meet the needs of generations to come. Currently the Y's operating budget is not able to fully fund depreciation, so the distribution from the Heritage Club endowment fund helps to finance capital maintenance and replacement.

"I give to the Heritage Club of the YMCA/YWCA of Marshalltown to build a long-term financial base to continue the work of the YMCA and YWCA. They both work to create a community full of children and adults that are healthy in spirit, mind and body."

- Mary Wertzberger, Heritage Club Member

"Marshalltown is so fortunate to have such a wonderful Y that positively impacts so many facets of our community. The Heritage Club provides the frosting on the cake for the Y organization to make it that much 'sweeter'."

- Maureen Lyons, Heritage Club Member



Thanks to the support of Heritage Club, the Y Preschool was able to purchase new playground equipment.

"The Marshalltown YMCA-YWCA has had and continues to have a significantly positive effect on me, my family and my community. My participation in the Heritage Club has allowed me to repay this wonderful organization."

- Terry Briggs, Heritage Club Member



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TODAY'S GIFT TOMORROW'S REWARD

YMCA-YWCA Heritage Club



Heritage Club supports many intergenerational YMCA-YWCA initiatives in the community.

The Y.™ For a better us.™

Marshalltown YMCA-YWCA

TOGETHER WE CAN CREATE A BETTER US

Every day the Y works side by side with our neighbors to make sure that everyone, regardless of age, income or background, has the opportunity to learn, grow and thrive.



CEO Carol Hibbs with the Y Preschool class.

A gift to the Y's endowment fund makes you a member of the Heritage Club which includes:

- An invitation to the annual recognition event in the fall
- Regular updates about Y initiatives
- The opportunity to make a lasting difference in our community

You believe in our mission. Here's how you can support the Y for future generations.

Outright Gift of Cash

Benefit: A charitable income tax distribution and the satisfaction of a gift of immediate impact to the Y.

Bequests

Benefit: Full control of your assets during your lifetime and a donation that is fully exempt of estate tax.

Charitable Gift Annuity

Benefit: A guaranteed income for life, current future savings on income taxes, and possible reduction or elimination of capital gains.

Charitable Trusts

Benefit: Fixed or variable income payments, a charitable income tax deduction and possible reduction of estate taxes.

Appreciated Assets

Benefit: A charitable income tax deduction, no capital gains tax on the sale of the asset and immediate impact to the Y.

Life Insurance

Benefit: Current and potential future charitable tax deductions and immediate impact to the Y.

We would be pleased to provide you, your attorney or financial advisor with additional information. The information presented here is general in nature and does not replace financial guidance you would seek from an advisory or attorney. We recommend you contact your financial advisor to learn how this information relates to your individual circumstances.

Please let us know if you have already included the Marshalltown YMCA-YWCA in your estate plans or if you'd like more information.

Contact:

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