



# 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**

My Name \_\_\_\_\_

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

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: \_\_\_\_\_