



# **LEADING THE WAY TOWARD A BRIGHTER FUTURE**

**THE HERITAGE SOCIETY**

**Attleboro Norton YMCA**

# OUR HERITAGE. YOUR LEGACY.

## OUR MISSION

The Attleboro Norton YMCA is a charitable organization dedicated to the physical, mental, and spiritual development of all. It fosters personal growth through quality programs and services provided in a positive environment by committed staff and volunteers.

## ABOUT THE Y

Since 1867, the Attleboro Norton YMCA has been dedicated to strengthening our communities by making a positive impact on youth development, healthy living, and social responsibility.

## ABOUT THE HERITAGE SOCIETY

Our Y's Heritage Society celebrates individuals and families who have chosen to make a lasting impact on the Y and our communities by generously making or planning future gifts to our Endowment Fund. These gifts of \$5,000 or more make it possible for the Y to continue serving our Y for many generations still to come.

## BENEFITS OF THE ENDOWMENT FUND

Just as we work to strengthen our minds and bodies today, the Endowment Fund helps strengthen our organization for tomorrow.

Each year, the Endowment provides funding for the Y to conduct critical capital projects that are necessary to maintain and upgrade our facilities to keep pace with our community's ever-changing needs.

The Endowment Fund can also provide a safety net to help the Y survive an economic downturn or unforeseen event. In April of 2020, the Board of Directors and the Endowment Fund's Trustees approved an emergency loan of \$100,000 so that the Y could continue to serve the community when our doors were closed and revenue minimized due to COVID-19. The Y was able to pay back the loan in December 2021.

The Endowment Fund ensures that the Attleboro Norton YMCA will continue to positively impact the children and families of future generations.



# HOW TO GET STARTED

## Be a part of the future.

There are several ways for YMCA supporters to make a lasting impact as a member of the Heritage Society. We are happy to discuss the options with you. All options require a commitment to benefit the YMCA's Endowment Fund with a gift of at least \$5,000. Below are a few ways to make a gift or plan a future gift to join the Heritage Society.

- **OUTRIGHT GIFTS** of cash, property, appreciated security or other marketable assets.
- **5-YEAR PLEDGES:** Pledges of \$5,000 or more can be paid out over the course of five years via automatic withdrawals or invoicing at the amount and frequency of your choosing.
- **WILL BEQUESTS:** Include a gift to the Attleboro Norton YMCA Endowment Fund in your will for a percentage of your estate, a specified amount, or the residue of the estate.
- **CHARITABLE TRUSTS** are gifts with life income retained by you and/or a loved one. After your lifetime(s), the trust principal passes to the Y's Endowment Fund.
- **BENEFICIARY DESIGNATIONS:** Name the Attleboro Norton YMCA as owner, or primary or contingency beneficiary of a new or existing insurance policy, your qualified IRA, pension plan, or bank account.
- **GIFTS OF APPRECIATED PROPERTY:** With advance planning, gifts of appreciated assets may be made in such a way as to enhance the long-term value of your life estate and the long-term income objectives for you and your family while still making important contributions to the Y.

## GIVING WITH TRUST Accreditation

The Attleboro Norton YMCA is an IRS designated nonprofit 501(c)3 organization. The Y's Endowment Fund is managed by an elected Board of Directors and Endowment Fund Trustees comprised of qualified individuals who share a commitment to the Y's mission and who ensure that all revenue generated by designated funds are directed appropriately. Investment of the Endowment Fund is managed by Bristol Wealth Group, whose representatives meet with the Trustees on a quarterly basis to review the fund's performance and investment guidelines.

If you are interested in joining the YMCA's Heritage Society, please contact us.

Attleboro Norton YMCA  
63 North Main Street  
Attleboro, MA 02703  
(508) 222-7422  
[attleboroymca.org](http://attleboroymca.org)

Robin Maxcy  
Director of Philanthropy  
[rmaxcy@attleboroymca.org](mailto:rmaxcy@attleboroymca.org)  
(508) 409-0755



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