



# THE CHOICE IS YOURS MAKE IT TODAY

## THE SIMPLICITY AND FLEXIBILITY OF BENEFICIARY DESIGNATION

Taking the time to choose your beneficiaries now will help your family and loved ones later, by avoiding probate. Many financial accounts require at least one beneficiary and most of the time you can add, change, or delete your beneficiaries simply online. A beneficiary doesn't have to be a person – it can be an organization whose mission you want to continue long after your lifetime.

When you name the YMCA of Metropolitan Denver as a beneficiary of a retirement plan, life insurance or investment account, you make an impact on our future and your legacy. Whether at a wellness center or program site across the city, the YMCA is a welcoming place where everyone is empowered to discover their purpose, pursue their health and well-being and connect with others to elevate themselves and their community.

**Retirement plan assets.** When left to loved ones, these assets are subject to income tax. When left to the Denver YMCA however, they pass tax-free, allowing us to put 100 percent of your gift towards transforming lives and communities.

## 4 STEPS TO THE GIFT OF A LIFETIME

1. Contact your administrator to request a change-of-beneficiary form or download a copy from their website.
2. Fill out the form listing your Primary Beneficiaries first by entering names, relationship and percentage assigned. This can be a mix of spouse, heirs and organizations. You can also name contingent beneficiaries. Contingent beneficiaries receive your assets if there is no living primary beneficiary.
3. Return the form to your administrator. (Be sure to keep a copy for yourself as well.)
4. Let us know about your gift! It would be our honor to thank you and fulfill what is important to you.

Note: Some retirement accounts or plans may require spousal consent before you can add or change the primary beneficiary.

**Life insurance policy.** Perhaps your children are now grown, and you have a life insurance policy you no longer need. Consider naming the Denver YMCA as your beneficiary. This gift allows you to make a substantial donation at a relatively low cost.

Tell your family, friends or organizations if you've selected them as a beneficiary, because your beneficiaries must contact your financial institution themselves. Your assets will be distributed to your beneficiaries without requiring a will or other legal documents.

## TAKE THE NEXT STEP

### Need help getting started?

#### Contact:

James Knowles  
Senior Director of Fundraising & Development  
720 918 6463  
jknowles@denverymca.org.

If you've already named the YMCA as a beneficiary, please let us know!



## QUICK TIP

Beneficiary designations can be updated at any time to meet your changing needs. Make sure you review your beneficiaries regularly to ensure they go where you want them to. When selecting an individual as the beneficiary, you'll need a date of birth and social security number; when selecting a nonprofit organization, you'll need the name, address and tax ID number. The YMCA of Metropolitan Denver office is located at  
2625 S. Colorado Blvd.,  
Denver, CO 80222,  
Federal Tax ID number is  
84-0402696.



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## IMPORTANT INFORMATION:

**Legal Name:** YMCA OF METROPOLITAN DENVER

**Address:** 2625 S. Colorado Blvd., Denver 80222

**IRS Tax Identification Number (EIN):** 84-0402696

**Website:** [PlannedGiving.DenverYMCA.org](https://PlannedGiving.DenverYMCA.org)

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