

ENSURING A BRIGHTER FUTURE

YMCA Foundation of Southern Arizona

*Serving the YMCA of Southern Arizona investing charitable gifts,
building legacy giving and demonstrating strong financial stewardship*

OVERVIEW

Founded in 1973, the **YMCA Foundation of Southern Arizona**, EIN 86-0326724, is a 509(a)(3) supporting organization established exclusively to benefit the YMCA of Southern Arizona. As such, it serves the YMCA of Southern Arizona investing charitable gifts, building legacy giving and demonstrating strong financial stewardship.

Purpose. The purpose of the foundation is to preserve the endowment corpus and increase the value of foundation assets through new gifts and investment growth. Foundation earnings finance YMCA programs today, while the principal goes forward into tomorrow. The Foundation has granted more than \$2.86 million to YMCA programs since its inception.

Heritage Circle. Those who make a meaningful gift to the Foundation join the ranks of many Tucson families who comprise the Heritage Circle. Below are donor giving categories.

Foundation Donor: Those who make gifts less than \$10,000 to the YMCA Foundation of Southern Arizona.

Heritage Circle Member: Those who make meaningful outright gifts to the YMCA Foundation of Southern Arizona. There is a recommended \$10,000 threshold to be recognized as a Heritage Circle Member. Heritage Circle Membership may also be achieved on the basis of cumulative giving to the YMCA Foundation.

Heritage Legacy Member: Those who make planned gifts to the YMCA Foundation through their wills or estates. There is no gift threshold to be recognized as a Heritage Legacy Member.

Investment Options.

Unrestricted. These gifts have no restriction or designation. The Foundation Board is able to use all or any portion for YMCA needs and Foundation operations.

Endowed/Corpus Only. These gifts may be unrestricted or designated, depending on the donor's wishes. The Foundation board endeavors to maintain the value of the initial gift and any new contributions. All earnings are swept annually and held as temporarily restricted assets until they are used for the purpose for which they were intended.

Endowed for Growth/Restricted Income. These gifts may be unrestricted or designated, depending on the donor's wishes. However, by donor restriction, only the interest income and dividends are available to be spent. All capital gains/losses must stay with the gift corpus thus limiting the amount that can be distributed to the YMCA each year.

Distributions. The YMCA Foundation makes an annual distribution to the YMCA. The YMCA ensures the funds are spent according to the donor's wishes and used to fund the YMCA's most pressing needs. The Foundation Board of Directors reviews its spending policy each year and distributes 3 to 5% of a twelve quarter rolling average of its investment's market value.

The Y

Our Cause. The YMCA is dedicated to making a difference in our community through a shared commitment to nurturing youth, promoting healthy living and fostering a sense of social responsibility. We believe that lasting personal and social change can only come about when we all work together to invest in our kids, our health and our neighbors. Every day, the Y strives to make sure that everyone in our community has the opportunity to succeed regardless of age, income or background.

For Youth Development. The Y nurtures the potential of children and teens. We believe the values and skills learned early on are vital building blocks for success. Through preschool and school-age programs, youth sports and teen leadership programs, Y kids learn important character values. They develop self esteem and most importantly learn how to be themselves.

For Healthy Living. The Y improves our community's health and well-being. We help children and adults understand the value of their health and offer resources and guidance to maintain or improve physical activity. At the Y, family time becomes active time and helps everyone grow in spirit, mind and body.

For Social Responsibility. The Y has been listening and responding to our community's most critical social need for nearly 100 years. Whether developing skills and emotional well-being, preventing chronic disease or building a healthier community through collaboration, we foster the care and respect all people need and deserve. Volunteers at the Y take an active role in bringing about meaningful, lasting change in a child's life, a family's existence or in the community at-large. Collaboration and partnership are part of the fabric of the Y.

Contact.

For more information about the YMCA Foundation, contact Kerry Dufour, Executive Director, Legacy Giving at (520) 906-6612 or email kerryd@tucsonymca.org.



YMCA FOUNDATION OF SOUTHERN ARIZONA
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