

**YOU HAVE THE POWER**  
**TO IMPROVE LIVES**  
**WELL INTO THE FUTURE**

GIVING TOGETHER  
LIVING TOGETHER  
SINCE 1919



As a United Way Loyal Contributor, you have made a commitment to help create a good life for everyone in our community. There are many ways for you to contribute to our community's future through a gift to United Way. The best one for you is a personal decision.

**BUILD YOUR LEGACY:** United Way Legacy Society recognizes your investment in our shared future. Gifts can be immediate or deferred. Some of the ways you can make a planned gift include:

- > A gift to United Way of Johnson & Washington Counties' Endowment Fund at the Community Foundation of Johnson County.
- > A gift through your will or estate plan. Designate United Way in your will making a Bequest for a gift of cash, transfer stock or a percent of your estate.
- > IRA or 401(l) beneficiary designation to United Way of a modest percentage, which may help you save significantly on your taxes.
- > Life insurance beneficiary designation of UWLife insurance that leverages an annual contribution.

**SUPPORTING UNITED WAY'S ENDOWMENT FUND:** Your gift to United Way of Johnson & Washington Counties' Endowment Fund at the Community Foundation of Johnson County will help strengthen our community's social fabric and create lasting change. Your foresight and generosity will help your neighbors, friends, and family for generations to come.

**NAMING UNITED WAY IN YOUR WILL, A BEQUEST:** This is a very popular giving option. You can designate a specific amount or a percentage of your estate to United Way. You can create a new will or modify an existing will by adding a codicil or amendment.

**DESIGNATING UNITED WAY THE BENEFICIARY OF A RETIREMENT ACCOUNT, 401K OR IRAs:** This gift is simple to make and very beneficial from a tax viewpoint. It is a tax-efficient asset to contribute because United Way does not pay taxes on amounts received. The same funds would be subject to income tax and, in some cases estate taxes if left to heirs. You would work with your account administrator to designate United Way as a beneficiary of your retirement account.

**OUTRIGHT GIFT OF CASH OR LONG-TERM APPRECIATED STOCK:** You can contribute cash or transfer stock to United Way. You will receive an income deduction and, for the stock, this gift avoids the capital gains tax.

**MAKING UNITED WAY THE BENEFICIARY OF AN EXISTING OR NEW LIFE INSURANCE POLICY:** You can designate United Way as the beneficiary of the life insurance policy. You can modify an existing policy or take out a new one. To receive an income tax deduction, you should be sure that United Way is the beneficiary and owner of the policy so that the value of the policy you contribute or future premiums you make are tax deductible. *(Life insurance is a particularly good option for donors in their 40s and 50s as premiums are lower.)*

Please consult with your attorney, financial planner or tax advisor regarding gifts of this nature. *When your attorney is preparing your will or estate plan., please use the full legal name – United Way of Johnson & Washington Counties, Inc. Tax ID Number: 42-6062055.*



On behalf of all the people whose lives are better because of you, THANK YOU!

For assistance please contact:

Lois Buntz, Director of Major Gifts & Leadership Giving at:  
319.338.7823 or by email at [Lois.Buntz@UnitedWayJWC.org](mailto:Lois.Buntz@UnitedWayJWC.org)

Or

Katie Knight, President & CEO  
319.338.7823 or by email at [Katie.Knight@UnitedWayJWC.org](mailto:Katie.Knight@UnitedWayJWC.org)