How to Live United Now and Forever

Create Your Legacy to Improve Lives Well Into the Future

**Donor Desires: my gift matters, is making impact, is my civic responsibility**

> United Way is effective, efficient and experienced
> You can partner with United Way to meet long-term community change NOW and FOREVER
> You can shape the future

**Donor Reason for United Way: support mission, value of United Way**

> The experience, scope and continued relevance of United Way means your gift is in good hands
> You can help a trusted organization – United Way
> You want to remember United Way in this way

**Donor Legacy: help generations, give and do more than thought possible, create a custom plan**

> Your gift is a meaningful legacy, helping the community
> Your gift will impact lives and solve problems we cannot imagine today
> Your name can forever be attached to something wonderful

**Ease and Timing of a Planned Gift**

> Can make a gift today, tomorrow or down the road when I pass away.
> The gift will be what is best for my specific situation.
> It is easy to include United way in a will, as a beneficiary of an existing lift insurance policy or retirement account, or give them a new policy

**Why We Give...**

**TAKE THE NEXT STEP:** You care about your community. You live and work to make it a better place. You are the person who asks, what more can I do to help? You can impact tomorrow by joining Unite Way Legacy Circle.

“United Way helps every child succeed and every family get ahead, so our whole community grows stronger. A legacy gift will help shape the future and solve problems I cannot imagine today.”

-United Way Donor

**UNITED WAY TOCQUEVILLE LEGACY CIRCLE:** A movement of community leaders committed to our community Now and Forever. To “endow” your annual United Way Tocqueville contribution, you would make a gift of 20 times your annual gift. The principal of the gift will be held in an Endowment Fund or an institution of your choosing. The income generated each year from this gift will perpetuate your annual contribution.

“We want everyone has the opportunity for a happy and productive life here in the place we call home. United Way was a good fit not only because its mission aligns with that goal, but also because it has a 100-year track record.”

-United Way Donor
GIVE TO THE FUTURE: You are unique. The Legacy Circle offers you the opportunity to direct your gift to an area of interest that best reflects your vision and passion. Your legacy gift will:

- Create a lasting impact
- Meet the community’s greatest needs
- Sustain United Way for the next generation

“We can’t think of a better investment that will meet long-term change and the spirit of our community.”
- United Way Donor

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 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 significant on your taxes
- Life insurance beneficiary designation of UWLifeline insurance that leverages an annual contribution.

“It always feels right to give to the good work of United Way. And the fact that the organization has been around for 100 years, makes me feel confident it will continue to do that in the future – and I’m happy to be a part.”
- United Way Donor

NAMED FAMILY FUND WITH UNITED WAY AND YOUR COMMUNITY FOUNDATION

- Investment management and fund oversight
- Yearly reports on investment returns and community impact report
- Opportunity for family to meet yearly to review funds and consider future investments
- Avoid the cost and administrative burden of a family foundation and donor advised funds

“We feel fortunate to have raised our family in this community and we want the same opportunities for all people in Johnson and Washington Counties”
- United Way Donor

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

Or

Katie Knight, President & CEO 319.338.7823 or by email at Katie.Knight@UnitedWayJWC.org