

Email \_\_\_\_\_

Phone # \_\_\_\_\_

Home  Work  Cellular

Address \_\_\_\_\_

City \_\_\_\_\_

Zip \_\_\_\_\_

Name(s) \_\_\_\_\_

I would like to learn more about joining United Way of Siouxland's Legacy Society.

Please complete the contact information below:

Mail information to me  Call to schedule personal visit

I have already included United Way of Siouxland in my estate plans.

By endowing your gift to United Way of Siouxland you will be honored as a member of United Way's Legacy Society and your gift will last forever. It is easier than you think and the impact it will have will be your legacy forever.

Your annual gift to United Way is important to ensuring the needs of our community are met. From now until June 2011, we are asking loyal United Way supporters, like you, to become founding members of the Legacy Society by endowing their annual gift.

(please complete and return to United Way)

## Legacy Society Interest Card



*Thank you for considering this request.*

Please complete the interest card below and return it to United Way at your earliest convenience. Visit [unitedwaysiouxland.com](http://unitedwaysiouxland.com) or call 255-3551 for more information.

By providing for the future through planned giving, you make it possible for United Way of Siouxland to improve lives, strengthen our community, and create a brighter future for us all!

United Way of Siouxland is launching its Legacy Society. Members who join from now through June 2011 will be recognized as Founding Members of the Legacy Society.

## Launch of Legacy Society • June 2010 - June 2011

*You're invited to join:*



# United Way of Siouxland's *Legacy Society*

# United Way Makes It Easy To Leave a Legacy of Caring

United Way of Siouxland has launched its Legacy Society where generous people like you can continue their legacy of caring forever. In 3 steps, you can become a member of the Legacy Society and continue to impact Siouxland forever.

## 1st DECIDE YOUR LEGACY IMPACT

Support United Way's mission to advance the common good or focus on a specific community goal:

- Ensuring Children Grow Into Successful Adults
- Helping Families and Individuals Achieve Self-Sufficiency
- Providing Basic "Safety Net" Services to People with Special Needs or Facing Crisis

## 2nd DETERMINE HOW YOU WILL FINANCE YOUR GIFT

Two of the most widely used vehicles include a simple bequest (provision in your will) or a donation of life insurance. Several other options are also listed below.

## 3rd LET US KNOW IF WE ARE IN YOUR ESTATE PLANS

Informing United Way of your plans assures your recognition as a Legacy Society member. You can leave a gift in memory of a loved one, on behalf of the family or for another reason. We will ensure that you are recognized and that your gift is invested as you wish.

## *A Planned Gift Can Help You Leave a Legacy*

As you may know, a planned gift is a charitable contribution incorporated into your financial, tax, or estate plans. Through planned giving, you can contribute to United Way of Siouxland while receiving financial benefits such as tax savings and increased income.



### **Can Planned Giving Benefit You?**

The benefits of planned giving include:

- Reduction or elimination of your capital gains tax on appreciated assets such as securities.
- Increased income for you or a person you designate as a beneficiary.
- Reduction of your income tax through the charitable income tax deduction.
- Decreased tax liability with the transfer of assets to your beneficiaries at your death.
- Gaining membership in United Way of Siouxland's Legacy Society.

### **Ways to Give**

Here are a few of the most popular options:

- Make a bequest in your will
- Donate a life insurance policy
- Give through your retirement plan
- Donate real estate or personal property
- Contribute appreciated securities (stock, bonds, mutual fund shares etc.)
- Give through a pooled income fund or donor advised fund, a charitable annuity or a charitable trust

Your financial or legal advisor can provide additional benefits and avenues to suit your needs.