

# Join United Way of Siouxland Legacy Society in 3 Easy Steps:

## Step #1 DECIDE YOUR LEGACY IMPACT

**Through my gift, I would like to invest in the future needs that United Way sees in the following area(s):**

**United Way's Mission:** I am committed to the mission of United Way of Siouxland and I wish for my gift to be invested in programs that need it most as determined by United Way leadership and board members.

If I choose, I can direct my gift to one of these specific goal areas:

**Children growing into successful adults:** Ensuring that all children are socially, emotionally and physically healthy and are ready to experience academic success.

**I am interested in this** – specifically, I'd like my gift to help: \_\_\_\_\_

**Families & Individuals Achieving Self-Sufficiency:** Promoting safety and health and providing access to resources that create and sustain economic stability.

**I am interested in this** – specifically, I'd like my gift to help: \_\_\_\_\_

**Safety Net Services:** Providing a foundation of fundamental care and support, essential to maintaining Siouxland as a caring community that meets basic human needs.

**I am interested in this** – specifically, I'd like my gift to help: \_\_\_\_\_

**Other: I am passionate about a program not listed above and I believe United Way can help fulfill my Legacy wishes.** (please explain) \_\_\_\_\_

## Step #2 DETERMINE HOW YOU WILL FINANCE YOUR GIFT

- Direct Gift (cash, check)
- Make a bequest in my will
- Donate a life insurance policy
- Give through my retirement plan
- Donate real estate or personal property Address \_\_\_\_\_
- 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
- Other \_\_\_\_\_

**Approximate Value of my Legacy Gift** \$ \_\_\_\_\_ or percentage \_\_\_\_\_%

**KEY to STEP #2** – You will need to file necessary paperwork through your attorney, investment bank or life insurance company to ensure that your wishes are known and legally documented.

## Step #3 INDICATE HOW YOU WOULD LIKE TO BE RECOGNIZED

**How I would like to be recognized:**

Example: *Mr. John Smith OR John & Laura Smith OR The John and Laura Smith Foundation*

Please recognize me as follows: \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ Zip \_\_\_\_\_

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

Email \_\_\_\_\_

Birthday \_\_\_\_/\_\_\_\_/\_\_\_\_

Signed \_\_\_\_\_ Date \_\_\_\_\_

**Please mail this form to United Way of Siouxland PO Box 204 Sioux City, IA 51102**

If you have any questions, please call United Way at 712-255-3551.

***Thank you, we will be in touch.***