

United Way Makes It Easy To Leave a Legacy of Caring

United Way of Siouxland's Legacy Society allows people like you to continue their legacy of caring forever.

United Way's mission is to improve lives by uniting the caring power of our community. We focus on bringing people together to impact the most pressing needs in Siouxland.

Two of the most popular ways to leave a planned gift to charity include adding a simple bequest (provision in your will) or through the donation of life insurance. Several other options are also listed below, many of which have big tax benefits.

Informing United Way of your plans assures your recognition in the Legacy Society. You can leave a gift in memory of a loved one, on behalf of the family or for others reasons. We will ensure that you are recognized or you can be anonymous.

A Planned Gift Can Help You Leave a Legacy

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.

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
- Contribute appreciated securities (stock, bonds, mutual fund shares etc.)
- Give through 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.



For more information contact United Way at 712-255-3551 or visit www.unitedwaysiouxland.com

MISSION: To improve lives by uniting the caring power of our community.

United Way of Siouxland Legacy Society Interest Form

(please complete and return to United Way)

Your annual gift to United Way is important to ensuring the needs of our community are met.

It is easier than you think and the impact it will have will be your legacy. 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.

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 a personal visit

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

Name(s) _____

Address _____

City _____ State _____ Zip _____

Phone # _____ Home Work Cellular

Email _____

Is there anything else you'd like to let us know? _____

Please return this form at your convenience to:

United Way of Siouxland
PO Box 204 Sioux City, IA 51102

Phone: 712-255-3551 Fax: 712-255-3028 www.unitedwaysiouxland.com

United Way of Siouxland
Legacy Society

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of Siouxland

