

HOW TO INCLUDE UNITED WAY IN YOUR WILL OR ESTATE PLAN



**YOU HAVE THE POWER
TO ADVANCE THE
COMMON GOOD
WELL INTO THE FUTURE**



A LEGACY OF GENEROSITY

In 2016, two remarkable women left generous bequests to United Way of Henderson County totaling almost one million dollars. Patsy Reeves and Elizabeth Warrick had been donors during their lifetimes, quietly making modest annual gifts that supported UWHC's work in our community.

They included United Way in their estate plans, and now their benevolence and vision will have a powerful impact in Henderson County for years to come. Their gifts will directly improve education, financial stability, health, and the basic needs of people in our community and change thousands of lives for the better.



United Way of Henderson County

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Hendersonville, NC
tel 828.692.1636
fax 828.696.8537
plannedgiving@liveunitedhc.org

UWHC Tax ID
56-0890133

MY BEQUEST

If you've already begun the process of making a planned gift, please use the section below to let us know.

This is to inform you that I/we have made or will make the following gift(s) to United Way of Henderson County:

- Bequest in my will or trust
- Qualified retirement plan listing UWHC as beneficiary
- Life insurance policy designating UWHC as: _____ beneficiary or _____ owner
- I would like to make an outright legacy gift: _____ Cash _____ Stock _____ Real estate _____ Other personal property

If possible, please list the type and amount of gift that includes United Way of Henderson County as a future beneficiary:

DONOR INTENT

- My/Our gift is unrestricted and should be used to improve lives in Henderson County, as determined by UWHC.
- My gift is restricted. Please contact me to ensure that my intentions are fulfilled.
- I would like to hear more about options for how my gift might be directed.

RECOGNITION

We will contact you regarding how you would like to be recognized now and in the future.

SIGNATURE _____

HOW TO INCLUDE UNITED WAY IN YOUR WILL OR ESTATE PLAN

It is easy to include United Way in your will or estate plans. Here are 4 of the most popular ways to do this. We would welcome the opportunity to meet with you to take the next steps.

1 NAME UNITED WAY AS A BENEFICIARY IN YOUR WILL

A bequest provision can be included in your will when you are creating it, or you can amend your existing will through the use of a codicil.

This arrangement provides you with flexibility and control should your circumstances change. You can designate an exact amount or asset or a percentage of the assets in your will.

2 MAKE AN OUTRIGHT GIFT OF CASH OR APPRECIATED STOCK OR REAL ESTATE

This is an excellent technique for individuals in a high tax bracket or those who have sold a business or received a significant bonus and could benefit from an immediate tax deduction. Have your broker give us a call.

To produce a tailored illustration of tax benefits from giving long-term highly appreciated stock visit: <http://national.unitedway.org/stock/>



3 NAME UNITED WAY AS THE BENEFICIARY OF A RETIREMENT PLAN

Perpetuating your gift through a retirement plan is simple, flexible and tax wise. Contact the administrator of your retirement plan to designate United Way as the beneficiary of your retirement plan. They can also let you know what restrictions might apply.

The benefits of naming United Way as the beneficiary of a retirement account include:

- Avoiding potential double taxation on retirement funds gift to heirs (estate tax and income tax).
- Allowing you to continue to draw money out of your retirement account while you are living.
- Providing you with the freedom to change your mind if your situation changes.
- Giving you the satisfaction of knowing that your hard-earned retirement funds will continue to impact people's lives in our community.

4 NAME UNITED WAY AS THE BENEFICIARY OF AN EXISTING OR NEW LIFE INSURANCE POLICY

Many contributors are attracted to life insurance because it enables them to make a larger gift than they would otherwise have been able to make. Here's how it works: you pay the premiums on a life insurance policy that will ultimately produce a sizable gift to United Way. If United Way is named as the owner and beneficiary, you will also receive a tax deduction for the annual premiums.

UWHC is not providing legal, accounting or other professional advice. Please consult your professional representative on these matters. All gifts are subject to approval according to the guiding principles of the gift acceptance policy and/or the UWHC Executive Committee prior to acceptance.



FULL NAME	_____	SPOUSE'S NAME	_____
MAILING ADDRESS	_____		
CITY	STATE	CITY	ZIP
PREFERRED PHONE	_____		
PREFERRED EMAIL	_____		

I AM INTERESTED IN MAKING A PLANNED GIFT. PLEASE HAVE A REPRESENTATIVE FROM UWHC CONTACT ME TO DISCUSS FURTHER:

- PLEASE CALL PLEASE EMAIL