



United Way
of Henderson County

PLANNED GIVING



Making a planned gift to United Way is a rewarding way to make a lasting impact. Your legacy gift will support United Way far into the future and help improve lives and community conditions for generations to come.

Name United Way of Henderson County as a Beneficiary in:

- Your will
- A retirement plan
- An existing or new life insurance policy

If you have an estate planner, we encourage you to work with them to include United Way of Henderson County in your estate plan.

INVEST IN

THE FUTURE

OF OUR

COMMUNITY



CONTACT US

Mailing Address:
PO Box 487
Hendersonville, NC 28793

Physical Address:
722 5th Avenue West
Hendersonville, NC 28739

Phone: 828-692-1636

www.liveunitedhc.org

United Way
of Henderson County



FULL NAME: _____

SPOUSE: _____

MAILING ADDRESS: _____

CITY/STATE/ZIP: _____

PREFERRED PHONE: _____

PREFERRED EMAIL: _____

ADDITIONAL DETAILS YOU WISH TO SHARE ABOUT YOUR GIFT: _____

SIGNATURE _____

MY BEQUEST

This is to inform you that I/we have included a charitable bequest to United Way of Henderson County in our estate plan.

This gift is designated through a:

- Bequest
- Charitable remainder trust
- IRA/Retirement plan beneficiary designation
- Charitable gift annuity
- Life insurance policy
- Other _____

Detach this portion and mail to:

United Way of Henderson County
PO Box 487, Hendersonville, NC 28793



**Learn how
to establish a legacy
that can MAKE A DIFFERENCE**

Bequests

Providing for United Way of Henderson County in your will may enable you to make a substantial contribution without diminishing the assets you may need during your lifetime.

Charitable Lead Trust

A charitable lead trust is a gift to United Way of Henderson County over a specific period of years. Income is paid to the United Way of Henderson County each year during the life of the lead trust. When the trust terminates, the assets revert to you or to a beneficiary of your choosing.

Charitable Remainder Trust

An irrevocable trust may be used to provide annual income to you or a loved one at either a fixed or variable rate. A portion of the trust qualifies for an immediate tax deduction. At the passing of the last income beneficiary, the assets in the trust are distributed to United Way of Henderson County to be used as the donor has designated.

Donor Advised Fund

If you have a Donor Advised Fund (DAF) with an organization such as the Community Foundation of Henderson County, you can follow their guidelines for disbursing funds to United Way of Henderson County.

Stock/Investments/ Appreciated Securities

A gift of stock is an impactful way to support United Way and a smart decision for your taxes. By transferring stocks, you can avoid capital gains tax, lower your tax burden, and donate the full amount to United Way. *You may electronically transfer stock through your broker to United Way account 258-07842-1, DTC# 0057 at Edward Jones 828-692-0237. Please list stock name and the number of shares you will be transferring.*

Retirement Accounts

Naming United Way of Henderson County as a beneficiary of a retirement account is an easy way to make a substantial gift and eliminate situations in which a distribution results in tax consequences.

Planned Giving

Planned giving arrangements have tax advantages and often include lifetime income to the donor and beneficiary named by the donor. Making a planned gift to United Way is a rewarding way to make a lasting impact. You can name United Way of Henderson County as a beneficiary in your will, a retirement plan, or an existing or new life insurance policy.

Real Estate

You may give a residence, land, income property, or other real estate to United Way of Henderson County and receive a tax advantage.

Do you have a traditional IRA?

If you are of qualifying age, you may be eligible to make a tax-free gift from your IRA called a Qualified Charitable Distribution (QCD). QCDs are always tax-free, regardless of whether or not you itemize deductions on your tax return.

What is a Qualified Charitable Distribution (QCD)?

A QCD is a direct transfer of funds from your IRA, payable directly to a qualified charity, as described in the QCD provision in the Internal Revenue Code.

UWHC is not providing legal, accounting or other professional advice. Please consult with 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.