

“When people plant trees under whose shade they will never sit, you know that civilization has come to that land.”

—Ancient Greek Proverb

United Way *Legacy Society*



Leave a legacy of impact. To become a member of the **United Way Legacy Society**, contact Christine Lewis at 630.645.6352



The United Way *Legacy Society*, is comprised of individuals who demonstrate extraordinary forethought and generosity to ensure the ongoing health and well-being of people in our community. Through outright gifts to the United Way *Endowment*, or through deferred gift commitments to United Way or its *Endowment, Legacy Society* members plant seeds of kindness that will improve lives for generations to come.

Why United Way?

United Way provides the leadership and resources it takes to help people in the DuPage area overcome challenges and become independent. Through a comprehensive community assessment, we work to understand the specific challenges that people in our local community are facing, and then we fund the network of programs that can best address those issues. Or we launch new initiatives that will. We hold ourselves and all our partner programs accountable for delivering measurable, lasting results—so you know your gift will make the greatest impact possible.

Why Now?

State and federal funding for health and human services has been decreasing each year for several years, though the need for services has risen dramatically. Many agencies in our area have had to cut budgets and eliminate critical programs, skip payrolls or even close their doors altogether. United Way is our community's largest non-governmental funder of health and human services and the single largest source of *unrestricted* funds (enabling agencies to pay the rent, keep the lights on—things that fewer and fewer public and private funders will cover). Yet, we have only one dollar for every three dollars of requests.

With resources declining as the needs continue to increase, supporting United Way is more important than ever to the well-being of people in our community. Through planned giving, you will help to ensure that United Way of the DuPage Area can continue improving lives for generations to come. You will leave a legacy of kindness.

Where will my gift go?

Your United Way donation will address the greatest needs and support only the most effective programs at agencies throughout the DuPage area. For example:

- **Educational Achievement** Your United Way support will provide early childhood programs to prepare kids for lifelong learning, as well as tutoring, mentoring and stay-in-school programs that keep youth on track to graduation.
- **Affordable Housing** Your United Way support will provide legal and financial aid for people who are at risk of losing their homes, assistance finding affordable permanent housing, and financial literacy training to educate families on budgeting and securing a mortgage.
- **Financial Stability** Your United Way support will provide job placement and employment retention training, transportation and daycare assistance for parents earning minimum wage, and ESL and GED programs to help adults secure employment and earn a living wage.
- **Access to Healthcare** Your United Way support will provide subsidized healthcare clinics, counseling and ongoing support for people with mental illness and substance abuse issues, specialized care for seniors and people with disabilities, and assistance in accessing and navigating the complex Medicare and Medicaid systems.
- **Crisis Support** Your United Way support will provide food and temporary shelter for homeless individuals and victims of home fires or other disasters, as well as safe houses, counseling, legal support and job training to help domestic violence survivors find safety and independence.



Supporting United Way is the most effective way to improve lives and strengthen our DuPage communities for years to come.

There are many ways to become a member of the United Way *Legacy Society*...

- **Outright Gifts to the United Way Endowment ***
Make a monetary contribution or provide gifts such as securities, real estate or other assets for investment in the United Way *Endowment*. Your gift will:
 - :: Provide resources for a quick and effective response to unexpected crisis.
 - :: Stabilize human care services at times when resources are less available.
 - :: Serve as a source of revenue to fund emerging needs.
- **Bequests through your will**
Name United Way in your will in the form of a stated dollar amount, specific property or a percentage of your estate.
- **Charitable gift annuities**
Transfer assets to United Way, through a contractual agreement, in exchange for an annual premium paid to you by United Way.
- **Charitable remainder trusts**
Place assets in a trust from which earnings are paid as income to you and your beneficiaries. Upon the death of the last beneficiary, the principal will be given to United Way.
- **Charitable lead trusts**
Place assets in a trust from which earnings flow to United Way for a stated number of years. After that period, the assets inside the trust will be distributed to your beneficiaries.
- **Insurance policies**
Name United Way as the beneficiary of all or a portion of your life insurance.
- **Retirement plan assets**
Name United Way as the beneficiary of all or a portion of your retirement plans.

Your financial advisor can guide you in choosing the best way to make a gift that fulfills your personal, philanthropic and financial goals. If you do not have a financial advisor, contact Christine Lewis at 630.645.6352 for a referral.

...and many benefits as well.

- **Make a lasting difference in your community.**
Regardless of how you choose to help, your gift to United Way will go on improving thousands of lives throughout the DuPage area. Your charitable dollars will answer the most critical needs and support the most effective programs—for generations to come.
- **Receive recognition for your philanthropy.**
As a member of the *Legacy Society*, you will be listed in the United Way Leadership Directory and the *Tocqueville Society* Membership Registry. You will also be invited to seminars throughout the year on topics related to legacy gifts and provided with updates regarding the role of United Way in the community.
- **Enjoy tax savings.**
Legacy Society gifts may qualify for federal and state charitable tax deductions—generally up to 50% of your adjusted gross income for gifts of cash and cash equivalents and up to 30% of your adjusted gross income for gifts of appreciated property. You may also enjoy additional tax benefits such as capital gains tax savings. Consult your personal financial or tax advisor to determine what benefits you may be eligible to enjoy.

* What is an endowment?

An endowment is a collection of monetary gifts that are deposited into a fund where they remain forever. The gifts are invested, and a portion of the income earned from these investments is provided each year to United Way. The original gifts in the fund—called the principal—remain untouched, generating income that will forever improve lives and strengthen our community.

