

LIVE UNITED



United Way
of Greater Philadelphia
and Southern New Jersey

PLANNED GIVING

DECLARATION OF INTENT

UnitedForImpact.org/plannedgiving

Thank you for your intention to include **United Way of Greater Philadelphia and Southern New Jersey** in your estate plan. In order to accurately document your intention, please complete this form with as much detail as you are willing to share. Any information about your gift will remain confidential. Completion and submission of this form does not create a binding obligation.

DESCRIPTION AND VALUE OF YOUR GIFT: Please indicate how your future gift intention will be fulfilled and provide the estimated value, if possible.

Description	Amount or Percentage (circle one)	Estimated Planned Value of Gift	OR	Gift Amount as of Today
<input type="checkbox"/> Bequest in Will or Living Trust	Amount / Percentage	_____		_____
<input type="checkbox"/> Charitable Gift Annuity	Amount / Percentage	_____		_____
<input type="checkbox"/> Charitable Remainder Trusts	Amount / Percentage	_____		_____
<input type="checkbox"/> Gift of Securities	Amount / Percentage	_____		_____
<input type="checkbox"/> Irrevocable Bequest	Amount / Percentage	_____		_____
<input type="checkbox"/> Life Insurance Policy	Amount / Percentage	_____		_____
<input type="checkbox"/> Pooled Income Funds	Amount / Percentage	_____		_____
<input type="checkbox"/> Real Estate	Amount / Percentage	_____		_____
<input type="checkbox"/> Retirement Fund/IRA	Amount / Percentage	_____		_____
<input type="checkbox"/> Other, please specify:	Amount / Percentage	_____		_____

RECOGNITION OF YOUR GIFT: We are honored to recognize your generosity through annual publications and events to celebrate the long term investment you are making in the quality of our region.

I/We would like to be recognized as: _____

Donor Name(s): _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Alternate Phone: _____

Email: _____

Signature: _____ Date: _____

For additional information, please contact Rebecca Forman, Associate Vice President of Major and Special Gifts at 215-665-2412 or rforman@uwgpsnj.org

Please return this form, completed and signed to:
United Way of Greater Philadelphia and Southern New Jersey
Attention: Rebecca Forman
1709 Benjamin Franklin Parkway
Philadelphia, PA 19103