



IMPACT THE FUTURE....

for Generations to Come

Imagine a **future** where all children have access to a high-quality education from cradle to career...where all working individuals achieve financial stability...and all community members have access to the resources they need to lead healthy lives. This could be your legacy.

At United Way of Greater Philadelphia and Southern New Jersey, we invest in strategies to address our region's toughest challenges in the areas of Education, Income, Health and Basic Needs – and with your help, we can expand the boundaries of what's possible.

Through our planned giving options, you can create a lasting legacy for future generations.

Donors who make planned gifts enjoy:

- The confidence that comes with investing in an organization that has been serving our local community for nearly 100 years
- Sizeable income and estate tax deductions
- Favorable capital gains tax treatment
- Additional options to provide income for you and your loved ones for life
- A legacy that fits your philanthropic goals

- ▶ *Leave your legacy and make a perpetual investment in the education and human service sectors in our local communities*
- ▶ *Meet the human services needs of our most vulnerable neighbors for generations to come*

*Plan your legacy gift to United Way today, and help us **Impact the Future!***



United Way
of Greater Philadelphia
and Southern New Jersey

IMPACT THE FUTURE....

for Generations to Come

United Way of Greater Philadelphia and Southern New Jersey offers a range of planned giving options designed to help you fulfill your philanthropic goals, provide for your family and secure the future of our health and human services community.

- ▶ *Bequests*
- ▶ *Charitable Gift Annuity*
- ▶ *Charitable Remainder Trusts*
- ▶ *Gifts of Securities*
- ▶ *Life Insurance Policy*
- ▶ *Pooled Income Funds*
- ▶ *Real Estate*
- ▶ *Retirement Fund/IRA*



ASSETS TO GIVE

Gifts of Cash

Gifts of cash put your generosity to work in our communities immediately and come with a tax deduction. Some gift options also allow for you to receive regular income.

Appreciated Securities

Appreciated securities allow you to bypass the capital gains tax, receive a tax deduction and in some cases arrange for an additional income stream.

Real Estate

Gifts of your appreciated real property based on the property's fair market value helps you avoid paying capital gains tax, receive a charitable income tax deduction and leave a lasting legacy.

Retirement Assets

Retirement assets allow you to make a lasting gift to United Way while bypassing multiple levels of taxation.

Life Insurance

Naming United Way as the owner and sole beneficiary of your Life Insurance policy entitles you to an income tax deduction; naming United Way as a beneficiary (but not an owner) of your Life Insurance policy entitles you to an estate tax deduction.



Planned gifts to United Way help ensure that our communities' education and health and human services needs are met for generations to come.

On behalf of all of those whose lives your generosity has the power to transform, we thank you for considering leaving a lasting legacy to United Way of Greater Philadelphia and Southern New Jersey.

UnitedForImpact.org/plannedgiving

To learn more about the options and benefits of planned giving with United Way of Greater Philadelphia and Southern New Jersey, please contact **Rebecca Forman** at **215.665.2412** or **rforman@uwgpsnj.org**.

The materials provided in this document are not intended as legal or tax advice. We encourage you to consult your own financial advisor to arrange a plan that best suits your personal circumstances and vested interest in United Way of Greater Philadelphia and Southern New Jersey.



United Way
of Greater Philadelphia
and Southern New Jersey