

# THANK YOU

We recommend you consult with your attorney or financial planner with any additional questions you may have to start planning your legacy today.

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**GIVE. ADVOCATE. VOLUNTEER.**

[unitedwaygw.org](http://unitedwaygw.org)

United Way  
of Greater Waterbury



# LEAVE A LASTING LEGACY IN YOUR COMMUNITY

**PLANNED GIVING**

United Way  
of Greater Waterbury



## WHY GIVE

### OUR MISSION

We mobilize financial and volunteer resources, and convene partners to address the needs of our community and to invest in approaches that measurably improve the community conditions for all.

### OUR VALUES AND APPROACH

**Respect. Collaboration. Caring. Integrity. Professional.**

We invite you to LIVE UNITED with us – to get involved by giving, advocating, and volunteering for the causes and issues that you care about and want to help improve.

**Want to leave a lasting legacy in your community? Start with a planned gift!**



## PLANNED GIVING

The United Way of Greater Waterbury has provided services to our community since 1942, making a difference in the lives of countless individuals. Through a planned gift you benefit our endowment fund and leave a lasting legacy which will have a meaningful impact on the future of our community.

### WAYS TO GIVE

#### Bequest by Will or Living Trusts

A bequest can be included in your Will or Trust. You can designate an exact amount or a percentage of assets. Gifts reduce your taxable estate and avoid income taxes that otherwise would be paid by your heirs.

#### Gifts of Retirement Plan Assets

Contact the administrator of your retirement plan to designate United Way of Greater Waterbury as a beneficiary. This option allows you to continue to draw money out of your retirement account while you are living. Gifts reduce your taxable estate and avoid taxation on gifts to heirs.

#### Gifts of Life Insurance

Designate United Way of Greater Waterbury as the beneficiary of a new or existing life insurance policy.

#### Charitable Gift Annuities

This gift of cash or securities pay you interest for a set number of years or your life at a rate higher than CDs and money market accounts; at the end of that time, the remaining assets pass to United Way. This option provides a current charitable income tax deduction.

1942 SOCIETY