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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LEAVE A LASTING LEGACY
IN YOUR COMMUNITY
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 asset 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 cash or existing life insurance policy.

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