UNITED WAY

PLANNED GIVING

Your Legacy. Our Future.

LEAVE A LEGACY OF LOCAL IMPACT.

Waverly-Shell Rock Area United Way has a long history of improving lives in our local communities. You can be a vital part of our future by making a planned gift. Planned giving allows you to:

- **Support the causes you care about:** Direct your gift to any of our initiatives, ensuring your passion continues to make a difference.
- **Secure your legacy:** Leave a lasting impact on our community and create a meaningful inheritance for future generations.

BENEFIT BEYOND GENEROSITY

Planned giving offers advantages for you as well:

- **Tax advantages:** Enjoy potential tax deductions and other benefits depending on the first option you choose.
- **Financial security:** Certain planned gifts can provide you with income during your lifetime, supplementing retirement or offering support to loved oens.

Together, we can make a difference.

Planned gifts are a cornerstone of United Way's long-term sustainability. By joining the 1951 Society, you'll be ensuring funding for our programs today and well into the future.

WWW.WSRUNITEDWAY.ORG/1951-SOCIETY

Waverly-Shell Rock Area
UNITED WAY

1951 Society

WAVERLY-SHELL ROCK AREA UNITED WAY improves lives and strengthens the education, income, and health of our communities by securing funds and promoting services for those in need.

UNITED WAY is creating opportunities for everyone to thrive. Imagine a community without needs, a self-sustaining community.

OUR KEY AREAS OF FOCUS:

- Financial security
- Healthy community
- Youth opportunity
- Community resilience



DISCOVER HOW PLANNED GIVING CAN
BENEFIT BOTH YOU AND THE COMMUNITY.

Contact Jill Krall, executive director at **director@wsrunitedway.org** or **319-352-2582**.

Types of Gifts

DONOR ADVISED FUNDS: DAFs offer a flexible and tax-efficient way to support your favorite charities. By contributing assets to a DAF, you can immediately receive a tax deduction while maintaining control over how and when the funds are distributed. This allows you to align your giving with your philanthropic goals and values over time.

IRA: A Qualified Charitable Distribution (QCD) is a tax-savvy way to meet Required Minimum Distribution (RMD) obligations. By donating RMDs to charities like W-SR Area United Way, you can reduce your taxable income while ensuring your charitable intentions are honored. This strategy can also help minimize taxes on IRA assets that would otherwise go to non-charitable beneficiaries.

LIFE INSURANCE: You can name W-SR Area United Way as a primary life insurance beneficiary or as a contingent beneficiary should your other beneficiaries not survive you. With the gift of life insurance, the benefits from the policy pass to United Way, free of federal estate tax, after your lifetime.

BEQUESTS: The easiest way to make an impact. A Simple, flexible and versatile way to endure we can continue to build a stronger community is through a chartable bequest, a gift from your will or living trust.

If you are considering a gift in your will, please feel free to use this sample language, which may be of assistance to you and your advisor:

"I hereby give W-SR Area United Way, a 501©(3) charitable organization, the following sum of $_____ OR _____% of the residue of my estate, OR described property:
_____ to use where the need it greatest OR to be directed toward _____."

Waverly-Shell Rock Area
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