

LEGACY GIVING: AN INVESTMENT IN THE FUTURE OF OUR COMMUNITY



LIVE UNITED...*Forever*

LEGACY IS A GIFT THAT LASTS FOREVER

United Way brings together people from across Broward County with the expertise and passion to make impactful change in our community.

The Annual Campaign and the Live United Forever Fund were established to propel the mission of United Way of Broward County now and into the future.

For 80 years, United Way of Broward County has engaged the community to tackle the most complex, critical challenges and create long-lasting positive change. United, we stand up for those who can't stand up for themselves, united we help those who are working hard and falling short, united we fight for the health, education and financial stability of every person in our community.

Legacy gifts give you the opportunity to **express your values, celebrate your generosity and inspire future generations.**

United Way works closely with you and your advisors to ensure your gift makes the greatest impact and fulfills your desire to leave a lasting legacy in our community.

The process is simple – the impact will be felt for generations to come.



LEGACY GIVING DOES NOT REQUIRE GREAT WEALTH... EVERY DOLLAR MAKES A DIFFERENCE TO THE CAUSE YOU VALUE.

HOW TO INCLUDE UNITED WAY OF BROWARD COUNTY IN YOUR ESTATE PLAN

An outright gift

A charitable donation to United Way of Broward County's Live United Forever Fund, provides immediate investment and ongoing annual support to the cause you value for generations to come.

Your outright gift of cash is fully deductible for federal income-tax purposes up to 50% of your adjusted gross income. If your total gift exceeds 50% of your adjusted gross income, the excess may be carried forward for tax purposes.

Make a qualified charitable distribution from your IRA

Anyone 70½ or older can contribute up to \$100,000 annually. The QCD (Qualified Charitable Distribution) allows you to transfer the money from your traditional IRA directly to United Way of Broward County without being added to your adjusted gross income.

Name United Way as a beneficiary in your will

A bequest is one of the easiest gifts to make. It can be included in your will when you are creating it, or you can amend your existing will through the use of a codicil.



Make United Way the beneficiary of a new or existing life insurance policy

Life insurance allows you to make a significant gift to United Way of Broward County. Name United Way of Broward County as the beneficiary/owner of a new policy. If the gift is irrevocable and United Way of Broward County is the owner and beneficiary of the policy, you are entitled to a charitable income tax deduction for all premiums paid.

If you own a policy that is no longer needed, donating it can provide an easy option to create your legacy. Simply make United Way of Broward County the sole beneficiary of a policy. When you transfer ownership of a cash value policy to United Way of Broward County, you become eligible for a charitable tax deduction based on its current value.

Make a gift of appreciated stock to United Way

A gift of appreciated stock that you have held for at least one year is qualified for an income tax charitable deduction, equal to the fair market value of the stock on the date of the donation, up to 30% of the donor's adjusted gross income.



Create a charitable lead trust

A charitable lead trust enables you to contribute to United Way of Broward County for a fixed number of years. After the specified amount of time, the remainder of the trust is transferred to the beneficiaries who have been designated by the donor.

Create a charitable remainder trust

A charitable remainder trust allows you the donor to contribute appreciated assets to a trust. The assets are invested and provide income at a designated percentage for you or a designated beneficiary for a lifetime or a specified number of years. When the trust ends, the remaining assets are transferred to United Way of Broward County in your name.

Can I name a fund?

Yes, to minimize administrative costs and maximize the power of your investment in our community, there is a threshold of \$200,000. The purpose of the fund aligns within our pillars, Health, Education and Financial Stability. And it is a wonderful way to remember someone or honor your family's legacy to the community.



ABOUT UNITED WAY OF BROWARD COUNTY

United Way of Broward County creates solutions for challenges faced by thousands of people in our community. Many organizations focus on one cause; United Way looks at the community as a whole and **works collaboratively to make positive change.**

United Way of Broward County works with community volunteers to identify specific gaps in services and then seeks partners and funds to develop programs that deliver measurable results. This approach brings the best people, ideas, talent and resources together to tackle complex challenges head-on to create **long-lasting change** in Broward County.

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For more information, contact
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