



Today.Tomorrow.United Way.

Opportunity to Build Capacity
Endowment Gift Agreement



**United Way
of Olmsted County**

903 West Center Street, Suite 100
Rochester MN 55902

*Mission: Uniting people
and resources to improve
lives in our community.*

Direct Gift

- ☐ I / We pledge to endow a gift of \$ _____ to be contributed with a:
- ☐ Pledge over _____ years (pledges may be spread over 3 to 5 years)
 - ☐ I / We will make installments in the amount of: \$ _____ each.
 - ☐ I / We would like pledge reminders: ☐ monthly ☐ quarterly ☐ annually
- ☐ I / We wish to make my/our contribution in the form of:
- ☐ Check ☐ Stock ☐ Credit/Check Card (Visa • Mastercard • Discover • American Express)
Card # _____ Exp Date ____ / ____
 - ☐ Payroll Deduction
 - ☐ Other (ongoing checking/savings withdrawal or credit card withdrawal)
- ☐ I / We wish to be recognized.
Please use the following name(s), exactly as they appear, in all acknowledgements:
- _____

Planned Gift

- ☐ I/We intend to include United Way of Olmsted County Endowment in my Planned Gift:
- ☐ Bequest - Will or Trust
 - ☐ Beneficiary of Life Insurance
 - ☐ United Way Life Program
 - ☐ Beneficiary of a Retirement Account
 - ☐ Charitable Gift Annuity
 - ☐ Other: _____

Recognition Name for the Hope Legacy Society (Planned Gifts of \$1,000 and above):

- ☐ I / We wish to be recognized.
Please use the following name(s), exactly as they appear, in all acknowledgements:
- _____

- ☐ I / We wish to remain anonymous

Endowment Choice

- ☐ I / We wish to have earnings from my/our endowment gift used to:
- ☐ Appropriate my dollars as needed (Unrestricted) Date _____
 - ☐ Support the annual campaign by endowing my annual gift
 - ☐ Fund grants or initiatives to address emerging community issues
 - ☐ Designate to a specific area of interest: ☐ education ☐ income ☐ health ☐ community basics

Signature _____ Date _____

Printed Name _____

As required by law, United Way acknowledges no commercial goods or services were exchanged for your contribution. Please retain a copy of this form for your tax records. All gifts are tax deductible to the extent provided by IRS regulations. Please consult your tax advisor for more information. The relationship we have with you is important. We do not rent, trade, sell, or otherwise make available a list of our contributors. (May 2012)