

GREAT FUTURES START WITH YOU!

A planned gift sustains our mission far into the future and provides you with unique benefits.



REDUCE YOUR TAXES



INCREASE YOUR INCOME



**CONSERVE YOUR
FAMILY'S WEALTH**



**FULFILL YOUR
CHARITABLE GOALS**

WE ACCEPT THE FOLLOWING PLANNED GIFTS:

- REQUESTS
- RETIREMENT ASSETS
- LIFE INSURANCE
- STOCKS
- GIFT ANNUITIES
- CHARITABLE TRUSTS

HOW A PLANNED GIFT HELPS YOU AND UNITED WAY

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My planned gift matters because I can provide a sustaining gift and know that I will always be supporting United Way. Only the appreciated value of the gifts will be used annually and the principal will remain for generations.

It's a great way to leave a legacy gift to our community.

- Retired IBM employee, Loyal Contributor

PLANNED GIVING – ANOTHER WAY OF CARING

United Way of Olmsted County works to address underlying causes of social problems to create lasting change in our community.

DONOR CONTRIBUTIONS FOCUSED ON

- **EDUCATION** preparing children and youth to succeed in school and in the community.
- **FINANCIAL STABILITY** ensuring basic needs are met and moving individuals and families toward financial independence.
- **HEALTH** promoting physical and mental wellbeing.

UNITED WAY'S 2-1-1 INFORMATION & REFERRAL SERVICE

Every day of the year, 211 connects people to resources they need, including housing, food, childcare, mental health services, and utility assistance.

COALITION BUILDING AND ADVOCACY

We bring together leaders from nonprofit, public, and private sectors to address our community's challenges. We build coalitions to create better outcomes through shared goals, shared measurements, and shared data. Coalitions provide a strong voice in advocacy and policy making.

CONTACT US

United Way of Olmsted County
903 West Center St, Ste 100
Rochester, MN 55902
(507) 528-4830 or RD@uwolmsted.org.

LEAVE A Lasting Legacy IN OUR COMMUNITY



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



START YOUR Legacy Journey

With a variety of Planned Giving options, it's easier for United Way of Olmsted County supporters to fit philanthropy into their budgets and long-term financial plans.

GIFTS THAT HELP TODAY

Stock, Donor Advised Funds, Retirement Assets (401k, IRA)

GIFTS THAT HELP TOMORROW

Provisions for United Way in Will, Trust, or Life Insurance

GIFTS THAT PROVIDE AN INCOME

Charitable Gift Annuities and Charitable Remainder Trusts

BEQUESTS

The most common type of planned gift and can be altered, should circumstances change.

- Give a **%** of your estate.
- Give a **specific \$ amount** or **asset**.
- Give the **balance or residue** of your estate.
- Give by **naming as beneficiary of a certain asset(s)**.

	Bequests	Stock	Donor Advised Fund	Life Insurance	Retirement Assets	Charitable Gift Annuities	Charitable Remainder Annuity Trust	Charitable Remainder Unitrust
I WANT TO MAKE A GIFT...								
during my lifetime		●	●		●	●	●	
after my lifetime	●			●	●			●
I WANT TO RECEIVE...								
fixed payments						●	●	
payments that vary								●
payments for life						●	●	●
payments for a term							●	●
I WANT TO MAKE A GIFT WITH...								
cash	●		●		●	●	●	●
appreciated securities	●	●				●	●	●
residence or real estate	●		●					●
I WANT TAX BENEFITS THAT...								
reduce income tax		●			●	●	●	●
lower capital gains		●				●	●	●
reduce estate taxes	●		●	●	●	●	●	●
other					●	●		

*Information is not intended to serve as financial advice.