

Planned Giving through United Way

Plan for your future and the future of our community at the same time through United Way Services of Geauga County's Endowment and Planned Giving Program. Charitable gift annuities and other options make it possible to secure income, as well as tax advantages, while supporting our community's health and human services for many years to come.

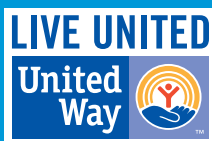
The Endowment and Planned Giving Program lets you map out your financial course in a flexible manner, balancing your financial goals and your family's needs with your charitable interests. By including United Way in your estate planning, you will enable its important work to continue with the resources it will require to address unforeseen needs in the future.

So what is your plan for the future? Make it one that ensures you and your loved ones' well-being and the long-term vitality of our community through United Way Services of Geauga County. Please take a moment to review some of the

Endowment and Planned Giving Program options outlined inside.



United Way Services
of Geauga County



HOW TO MAKE YOUR PLANNED GIFT

Gifts to United Way's Endowment and Planned Giving Program can be simple, flexible and easy to make. Brief descriptions of several options follow for your review.

Bequests A bequest is a specific amount of money or other asset defined in a will, trust or individual retirement plan. If you make a bequest to United Way, please let us know. We truly appreciate it.

Charitable Gift Annuities With a charitable gift annuity, you can make a gift to United Way in return for a guaranteed lifetime annuity payment. The charitable gift annuity offers a partial charitable tax deduction for the value of the remainder gift.

Charitable Lead Trusts A charitable lead trust allows you to direct annual distributions from property held in a trust to be paid over time to United Way, with the property eventually being distributed to your loved ones largely free of federal gift and estate taxes.

Charitable Remainder Trusts A charitable remainder trust allows you or a beneficiary you designate to receive annual payments from property held in trust for your lifetime or for a term of years, with the remainder passing to United Way once the annual payment period ends. In exchange for your contribution to the trust, an immediate tax deduction is available for the value of the gift, and capital gains taxes on property you contribute may be avoided or deferred.

Life Insurance By transferring ownership of a life insurance policy to United Way, you can leave a gift that will not be delayed by estate probate.

Cash Through a direct cash gift, you immediately ensure that United Way will continue to meet the future health and human service needs of our community.

Securities and Other Liquid Assets Funding a charitable gift with stocks, bonds, IRA or retirement balances can prevent it from becoming taxable in your estate, and the gift is made in pre-tax dollars.

Please contact Jerry Allee at 216-436-2049 or jallee@uws.org and he will assist you in making the best decision for your individual plan.

Planned Giving through United Way

Plan for your future and the future of our community at the same time through United Way Services of Geauga County's Endowment and Planned Giving Program.

- Yes, I have already made estate plans to continue support of United Way Services of Geauga County.
- No, I have not yet made provisions to support United Way Services of Geauga County in my estate plan.

Name

Company/Organization

Preferred Address Home Office

City

State

Zip

Daytime Phone

Home E-Mail

Thank you for your support.

United Way Services
of Geauga County



Mission: United Way Services of Geauga County unites people and resources to improve lives.

Our Vision: United Way Services of Geauga County is the organization recognized for collaborating with others to address community needs and provide support for local agencies.

United Way Services of Geauga County is the premier volunteer organization in the county. It continuously motivates the community to increase its investments of time, talent and resources in order to improve the quality of life of others.

United Way Services of Geauga County works with area providers to increase the organized capacity of Geauga County residents to care for themselves and one another.

United Way Services of Geauga County is acknowledged within the community as the leading organization in each of these areas.

209 Center St., Unit H, Chardon, OH 44024
216-436-2049 • uwsgc.org

130608/50

United Way Services
of Geauga County

