



UNITED WAY
of the Midlands

UNITED WAY OF THE MIDLANDS **PLANNED GIVING**



BUILD YOUR LEGACY

IMAGINE WHAT YOUR GENEROSITY CAN DO

IT'S EASIER THAN YOU MIGHT THINK TO GET STARTED

Our team will work with you or your financial advisor to make sure your planned gift reflects your values and vision. We'd be honored to help you continue building your legacy:

- Structured with care
- Stewarded with integrity
- Sustained for lasting impact

LET'S TURN YOUR VISION INTO REALITY

Whether you care deeply about areas like food access, health and housing, opportunities for youth or financial security – we can customize your giving plan to reflect your priorities.

From beneficiary designations to establishing a named endowment, there are many meaningful ways to structure your gift for immediate results or long-term support.

Together, we can tailor a plan that's right for you:

- Endowment Gifts – The Forever United Fund
- Beneficiary Designation Gifts
- Bequests
- Custom Charitable Fund Investment
- Charitable Lead Trust
- IRA Rollover
- Donor Advised Funds
- Trust Gifts and More

BUILT TO STAND THE TEST OF TIME

UWM has been investing on behalf of the community for more than 100 years – it's the heart of what we do. Our investment process draws upon best practices in philanthropy and strong partnerships, so you can trust your gift will be managed with care and efficiency.

- **Guided by strategy** developed and maintained by respected community leaders.
- **Accountable with oversight** from an experienced, local Board of Directors.
- **Fueled by a culture of giving**, led by business and civic leaders who champion this work across the metro.
- **Invested with care**, through community volunteer reviews that ensure funds are directed where they'll do the most good.
- **Measured through data and outcome tracking** that helps us evaluate results and strengthen future investments.

**HOW YOUR
LEGACY
BUILDS OVER TIME**

*Based on an average 5% return

50 YEARS	\$500,000 gifted in spending grants
25 YEARS	\$250,000 gifted in spending grants
10 YEARS	\$100,000 gifted in spending grants
\$200,000 ENDOWMENT GIFT	

With a planned gift to United Way of the Midlands (UWM), you can extend your care for community for years to come. It's how you ensure that the people, places and causes you hold close continue to thrive.

THE LEGACY SOCIETY

With a planned gift to UWM, you become part of the Legacy Society – a group of philanthropists who believe in building something that lasts. It's a community of forward-thinking donors who've made the choice to invest in the future and to ensure their generosity keeps working for the community they love.

LET'S START THE CONVERSATION AND TALK ABOUT BUILDING YOUR LEGACY

Our planned giving team would welcome the opportunity to speak with you and your financial advisor to discover the giving option that's best for you, and the impact you want to make for our community. We would be honored to be a partner in building your legacy.

If you have questions,
please contact Kevin Van Winkle.
Call **402.630.4458** or email
kvanwinkle@UWMidlands.org



Born and raised in Council Bluffs, Ron Lewer was a quiet, lifelong giver whose deep generosity and simple living led to a legacy gift of more than \$836,000 to United Way of the Midlands – supporting the community he uplifted throughout his life.



"We give to United Way because we want to help make a difference for our neighbors in need in the Omaha-Council Bluffs metro for many years to come."

– Tim and Traci Harrison



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For a complete list of ways to give, visit our website

www.uwmforeverunited.org