

YOU HAVE THE POWER
TO ADVANCE THE
COMMON GOOD
WELL INTO THE FUTURE

HOW TO INCLUDE UNITED WAY
IN YOUR WILL OR ESTATE PLAN



United Way of Walworth County
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UNITED WAY IS WORKING TO
ADVANCE THE COMMON GOOD
BY FOCUSING ON THE BUILDING
BLOCKS FOR A GOOD LIFE —
EDUCATION, INCOME AND HEALTH.
WITH YOUR SUPPORT, WE CAN
CREATE A BETTER LIFE FOR
EVERYONE, NOT JUST TODAY BUT
WELL INTO THE FUTURE.

CONSIDER INCLUDING UNITED WAY
IN YOUR WILL OR ESTATE PLAN.

GIVE. ADVOCATE. VOLUNTEER.

**HOW TO INCLUDE UNITED WAY
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HOW TO INCLUDE UNITED WAY IN YOUR WILL OR ESTATE PLAN

It is easy to include United Way of Walworth County in your will or estate plans. Here are 4 of the most popular ways to do this.



1 Name United Way as a Beneficiary in Your Will

Many people have devoted their lives to helping others and would like their legacy to continue beyond their lifetime. By designating a percentage of your estate to the United Way of Walworth County's Endowment Fund, your generosity will continue to benefit those in need forever. If you wish to designate a percentage of your will, trust or estate, please include the following in the bequest language in your plans:

"I give the sum of \$_____ (or _____% of my estate) to the United Way of Walworth County, Inc., a Wisconsin not-for profit corporation with its primary address at 203 E Walworth St, Elkhorn, WI 53121. Its FEIN number is 39-1471340.

3 Name United Way of Walworth County as the Beneficiary of an Existing or New Life Insurance Policy



Many contributors are attracted to life insurance because it enables them to make a larger gift than they would otherwise have been able to make. Here's how it works: you pay the premiums on a life insurance policy that will ultimately produce a sizable gift to the United Way of Walworth County. If the United Way is named as the owner and beneficiary, you may also receive a tax deduction for the annual premiums.

2 Name United Way of Walworth County as the Beneficiary of a Retirement Plan

Perpetuating your gift through a retirement plan is simple, flexible and tax wise. Contact the administrator of your retirement plan to designate the United Way of Walworth County as the beneficiary of all or a percentage of your retirement plan. The benefits of naming the United Way as the beneficiary of a retirement plan include:

- Avoiding potential double taxation on retirement funds gift to heirs. (estate and/or income taxes)
- Allowing you to continue to draw money out of your retirement account while you are living.
- Providing you the flexibility to change your mind if your situation changes.
- Giving you the satisfaction of knowing that your hard-earned retirement funds will continue to impact people's lives in Walworth County communities.

4 Make a Gift through a Charitable Gift Annuity and Receive Payments for Life.

If you would like to benefit from interest that may be higher than you can obtain from CD or money market accounts, a charitable gift annuity is an excellent option, especially if you are over 60 years old. You would receive annuity payments for life and the remainder of the gift would benefit our community through the United Way. The projected amount of the gift that would go to the United Way is tax deductible.

FOR MORE INFORMATION:

Call 262.374.4474 or email LegacyGifts@UnitedWayWalworth.org. Visit www.UnitedWayWalworth.org to learn more about who we help!

Please note: The United Way recommends that any potential donor contact his/her tax, legal or estate planning professionals to be sure that the planned gift is appropriate for the donor's estate plan.