

HOW DO I PLAN FOR THE FUTURE?

Many of us think of estate planning as something important to do—but something that can be postponed. Preparing your estate plan does not need to be complicated.

Here are some tips to help you get started:

- 1 Gather information about your assets, including retirement funds, bank accounts and property.
- 2 Think about the people and organizations that matter most to you and how you'd like to provide for them.
- 3 Consider who will serve as your executor or trustee.
- 4 Meet with an attorney or wealth management professional.

Did you know that there are potentially significant tax benefits to including a charity in your estate plan? Those who join United Way's Legacy Society ensure that future generations will have the resources to continue improving lives and community conditions right where we live and work.



INVEST IN THE FUTURE OF OUR COMMUNITY

Making a legacy gift to United Way is simple, rewarding and incredibly impactful. We thank you for your loyal support of our mission to improve lives right here in Kennebec Valley.

The I.R.S. recognizes United Way of Kennebec Valley as a 501(c)(3) nonprofit organization. Our federal tax ID number is 01-6004404.

If you have questions about United Way's Legacy Society, please contact us.



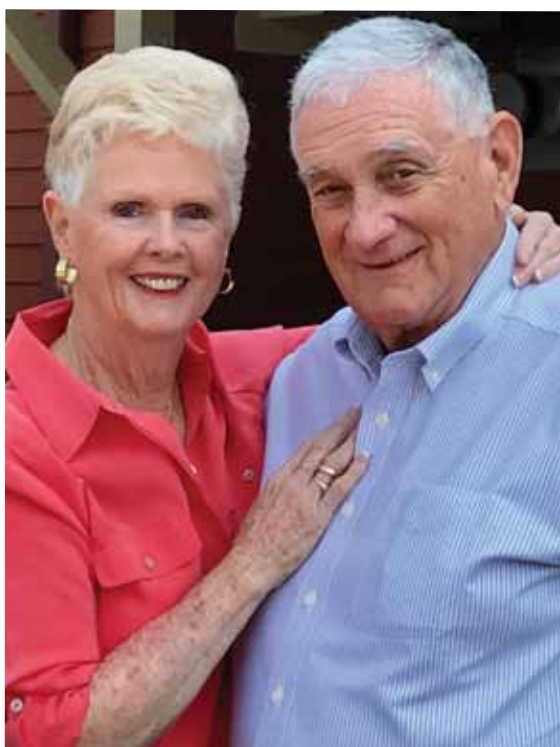
United Way
of Kennebec Valley

121 Commercial Street
Augusta, ME 04330
207-626-3400

info@uwkv.org
www.uwkv.org/legacy-society



Leave a legacy of caring



When you think about making a gift in your estate, you reflect on the causes and values that are most important to you. For us, that's United Way of Kennebec Valley. As we plan for the future, we know that United Way allows us to maximize our giving power and touch as many lives as possible.

—Warren & Donna Kessler
Retirees living in Manchester, Maine

As a United Way supporter, you have demonstrated your personal commitment to the health, safety and financial stability of every person in our community. Now, we hope you will consider a different type of gift—a special gift to United Way through your estate plan.

POTENTIAL BENEFITS

- Charitable income tax deduction
- Increased income for you or a person you designate as a beneficiary
- Remove future appreciation of donated property from your taxable estate
- Decreased tax liability with the transfer of assets to your beneficiaries
- Fulfill your wish to leave a lasting legacy on your community through United Way

WAYS TO GIVE

- Make a bequest in your will
- Donate a portion of your life insurance policy
- Give through your retirement plan
- Contribute appreciated securities (e.g., stock, bonds, mutual fund shares)
- Give through donor-advised fund, charitable annuity or charitable trust

Informing United Way of your plans ensures that your future gift is used according to your wishes. Contact us at 207-626-3400 for more information.



Yes, I accept the invitation to join United Way of Kennebec Valley's Legacy Society. UWKV is in my estate plan.

You may include my/our name in public Legacy Society recognitions. Please list me/us as:

I/We wish to remain anonymous.

(Optional) This gift has been arranged through:

- Will/living trust bequest
- Life insurance policy beneficiary
- Charitable trust
- IRA/retirement fund beneficiary
- Bank/brokerage account

Please contact me about including UWKV in my estate plan.

Name(s) _____

Address _____

City _____ State _____ Zip _____

Phone _____

Email _____

Additional details you wish to share:

Return to 121 Commercial St., Augusta, ME 04330