WE INVITE YOU TO JOIN US.

As a loyal supporter of United Way of the Greater Lehigh Valley, you have already made a commitment to our community. You have stepped forward to say, "Yes, I want a good life for everyone."

In recognition of your commitment, we invite you to become part of United Way’s Legacy Circle, a special group of community leaders dedicated to strengthening the future of the Lehigh Valley. Legacy Circle members are making an impact not only for their lifetime, but for many more to come.

UNITED WAY OF THE GREATER LEHIGH VALLEY

Together, we are building a stronger community – one where our kids can receive a good education, our seniors are cared for, our families have healthy food on the table every day and everyone has access to emergency services during times of crisis.

Recognizing that big challenges still exist, we know with dedicated people like you, we are able to continue making a positive impact to turn these challenges into opportunities. Your leadership opens the doors for an even greater Lehigh Valley. When we LIVE UNITED, and we all focus on common goals, together, we achieve more.

United Way of the Greater Lehigh Valley

LEGACY CIRCLE

CREATE YOUR LEGACY. TODAY.

1110 American Parkway NE, Suite F-120 Allentown, PA 18109 610.758.8010 | UnitedWayGLV.org
ENDOWMENT FUND

What is an endowment?
An endowment is a donor-designated, permanent fund that is carefully invested for growth and provides a dependable revenue stream year after year. Endowment gifts remain intact and a portion of the investment return is available annually to support the mission of an organization. Experts agree that annual distributions of 3–5% of a multi-year rolling average ensure sustainability.

Why does United Way need an endowment?
The endowment provides long-term financial stability and works in tandem with the annual campaign to build capacity in meeting both current and future needs. Endowment gifts help stabilize funding in challenging economic times and ensure program longevity.

How can I support United Way’s Endowment Fund?
Long-term in scope, United Way affords donors like you the opportunity to leave a lasting legacy and extend your support of our United Way beyond your lifetime. See “Ways to Give” for endowment gift options.

Who manages United Way’s Endowment?
The endowment fund is managed by professional money managers with oversight provided by UWGLV’s Board of Directors which is comprised of local community leaders. This group is focused on devising strategies to build and wisely invest all gifts to United Way, including our Endowment Fund.

What is the difference between my annual campaign gift and my endowment donation?
Unlike the annual campaign, where we hope you will choose to renew your support each year, gifts to United Way’s Endowment Fund are not annual in nature and are, in most cases, a gift from assets rather than income. Depending on donor circumstances, most endowments are deferred commitments that will be realized at a later date.

Are there options in designating my endowment gift?
Yes. The Endowment is comprised of both a restricted and unrestricted fund. You may choose to make a gift to the restricted fund which supports UWGLV’s four major focus areas (education, food access, healthy aging and emergency services), or a specific United Way partner agency program. Additionally, you may choose to support the unrestricted fund which more broadly supports the greatest needs of the community. You may also designate to a specific agency you currently support.

WAYS TO GIVE

Donors who perpetuate or “endow” their United Way contribution, make a gift in an amount to generate income to support their annual contribution. Gifts to the Endowment Fund offer the potential for income tax deductions and may reduce the size of an estate, therefore reducing estate taxes. In addition, some employers match employee gifts, which can also lower costs. There are multiple financial options to make an endowment with United Way. As always, when considering any type of philanthropy, donors should consult their tax advisor.

United Way in a Will as part of your Estate Plan
Designate a specific percentage or dollar amount to a newly-created will. Simple modifications can also be made to an existing will by adding a codicil or amendment.

Cash or Appreciated Stock
Contribute cash or transfer stock to United Way. Current gifts receive an income tax deduction and avoid the capital gains tax.

United Way as a Beneficiary of a Retirement Plan
Designate United Way as a beneficiary of a retirement account and receive an income tax deduction. If the retirement account passed to heirs, it would be taxable to them.

United Way as a Beneficiary of a Life Insurance Policy
Designate United Way as a beneficiary of a life insurance policy. This is a particularly good option for Tocqueville donors in their 30s, 40s and 50s since premiums are lower.

"Split Gifts" (Charitable Gift Annuity, Remainder Trust and Lead Trust)
These are more complex gifts and we are happy to sit down with you to work out a plan that best fits your family situation.

MAXIMIZING PHILANTHROPY

In an effort to help United Way identify, define and solve long-term community needs, an anonymous couple has committed up to $2,000,000 in matching funds for any current and/or future designated gift intentions to United Way’s Endowment Fund.

The official registration and financial information of United Way of the Greater Lehigh Valley may be obtained from the Pennsylvania Department of State by calling toll free, within Pennsylvania, 1 (800) 732-0999. Registration does not imply endorsement.

If you’ve provided a gift to United Way’s Endowment Fund, please let us know. We would like to properly recognize your donation and officially welcome you to our Legacy Circle.

For additional information, or to discuss making a gift to United Way’s Endowment Fund, please contact Paul Hurd at 610.807.5721 or paulh@unitedwayglv.org.

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BUILD A BETTER TOMORROW.

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